Short-Term Growth Management Strategy

Residential

Information Update 2000 - 2004

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Short-Term
Growth Management Strategy

Residential
Information Update 2000 - 2004

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PAGE

Foreword iii

1 Executive Summary and Conclusions 1

2 Purpose of the Update 4

3 Economic Outlook: 2000 - 2004 5

4 Population Growth: 2000 - 2004 6

5 Housing Forecasts: 2000 - 2004 7

6 Suburban Residential Land Requirements; 2000-2004 9

7 Indicators of Market Share, by Sector 11

Building Permit Statistics 11
Building Permit Applications 12
1999 Developer Survey 12
Housing Starts 13
Subdivision Activity 13

8 Land Available for Residential Development, by Sector ... 14

Current Single Family/Duplex Lot Inventory 14
Vacant Residential Lot Inventory 14
Unsubdivided Residential Land Supply 15

9 **Probable Supply/Demand Conditions, by Sector** 18

North 19
Northeast 20
East 21
Southeast 21
South 22
West 23
Northwest 24

10 **Servicing Implications** 26

The Need for Utility Extensions 26
Implications of the "Serviceable" Land Supply 27
Servicing Implications, By Sector 30

APPENDICES

APPENDIX I:

TABLES, FIGURES AND MAPS A-1

APPENDIX II:

SECTOR PROFILES A-33

APPENDIX III:

DEVELOPMENT INDUSTRY COMMENTS A-63

Foreword

The land development and house-building industries attempt to be as responsive to changes in the marketplace as possible. The amount of housing constructed, the location of development activity and the types of housing most active at any point in time will vary with changing rates of population growth, consumer preferences, interest rates, house prices, expectations for the future, competition in the marketplace and many other related factors.

As a result, the development of residential land — that is, the transition of "raw" land (i.e., vacant or in agricultural use) to fully-serviced, subdivided, "ready-to-build-on" lots — involves a good deal of uncertainty. **The amount of development in any given year is not certain, nor is its distribution among various builders, developers and communities.**

Within this changing and, at times, volatile environment, the City is called upon to provide utilities and transportation services to enable the "bringing on-stream" of new lands for development. The timing of expenditures for sewers, water and other utilities must occur prior to housing construction — which itself is in response to a changing marketplace. Some transportation facilities may be needed to provide initial access to new development —other facilities may be provided much later, as areas develop more fully. The City must also plan for and provide a wide range of other municipal facilities and services to new communities as they grow.

The challenge facing the City then, is to be prudent in avoiding the premature extension of costly utilities and services while making every effort to support a competitive, efficient land development process. This ongoing "balancing" occurs in several forums at the same time (e.g., planning and subdivision approvals, budgeting processes, utility construction scheduling). To assist this balancing process, a shared view of the future is not only helpful but necessary.

This report is designed to provide an accurate description of recent suburban residential development activity in Calgary and to forecast activity for the 2000–2004 period. **The report does not contain policy recommendations or explicit budget priorities**—its contribution lies in providing a solid, comprehensive information base to support planning, development and budgeting decisions.

1

Executive Summary and Conclusions

A key purpose of this report is to examine the expected fit between residential land demand and supply over the coming five year period. **The intent is to ensure that there exists a sufficient supply of readily developable land, in a variety of locations, to facilitate competitive land and housing markets, while avoiding premature municipal investment in utilities and services.** It is fully recognized that supply and demand conditions are in a constant state of flux and that it is important to monitor changes on an ongoing basis and to undertake a similar review of circumstances annually.

On the basis of the analysis presented in this report, the Growth Management Technical Committee wishes to put forward the following conclusions:

- Over the next five years, Calgary's population is expected to increase by an average of approximately 19,120 people per year, for a total increase of approximately 95,600 people by the year 2004 based upon The Calgary Economic Outlook Report 1999 through 2004.

- Demand for new single family/duplex housing is expected to range between 5,750 and 6,300 units per year, resulting in an increase of approximately 30,350 new units between 2000 and 2004.

- The demand for new housing in suburban areas will likely utilize approximately 5,060 acres of residential land over the next five years, or approximately 1,000 - 1,100 acres/year.

- The likely distribution of suburban growth over the next five years is shown on Map 8 of Appendix I.

- A substantial supply of residential land with "Utility Capacity in Place" presently exists (i.e., with minimal utility servicing cost to The City), sufficient to satisfy expected demand on a **city-wide** basis through the five year forecast period. **However, serviced land shortages may occur in particular sectors within the next five years unless new service extensions are undertaken.** More particularly, shortages of serviced land are forecast within the North and Southeast sectors unless new service extensions are undertaken. Current serviced land capacities should be adequate over the next five years in all other sectors with the possible exception of the South, until transportation issues are resolved.

- On the basis of the forecasts contained in this report, and if a reasonable float of land with "Utility Capacity in Place" is to be maintained in each sector, The City should consider undertaking or facilitating utility extensions over the next five years in the sectors shown below.

Sector	Probable Year in Which Utility Extensions Will be Required*	Utility Extensions Required to Service Areas with Some Capacity in Place** (green)
North	2000 - 2001	sanitary and storm
Northeast	—	—
East	—	—
Southeast	2000 -2001	water
South	after 2003	sanitary and water
West	after 2003	storm and water
Northwest	after 2003	water

This information will be considered in developing The City's 2000–2004 capital budget programs and the 10 Year Capital Spending Update.

- In terms of transportation requirements, access can be provided to support the initial development of most areas with utility capacity now in place (refer to Sections 9 and 10). However, it should be noted that access to new subdivisions is relatively easy to accommodate compared to the downstream transportation impacts. With additional areas opening up for development, and with the overall growth in the city, the level of service of the transportation system will be reduced in some areas unless additional expenditures are made beyond those in The City's current capital budget envelope. Many intersections throughout the city are now operating at capacity and failing during peak periods (refer to Map 5, Appendix I). New growth will further limit mobility on the road system and possibly lead to increased short-cutting through residential neighbourhoods.

- The new funding structure recently announced by the Province will assist in providing road capacity to accommodate new development. Project priorities are presently being amended and are not now available for inclusion in this report.

- The City should also continue to anticipate requests from individual developers to extend services to new areas. The *Calgary Plan* indicates that actual expenditure decisions related to the construction of municipal infrastructure should be evaluated through The City's Short Term Growth Management decision making process (Calgary Plan, 2-2.2.2.1H). These requests can be evaluated on their own merits and brought forward to Council for consideration.

In responding to these requests, Council will find guidance in *The Calgary Plan*. It indicates that decisions on capital expenditures relating to the extension and/or upgrading of municipal water, storm, sanitary, and transportation systems, should be made through the normal budgeting process and after consideration has been given to:

- the overall capital cost implications of the extensions, including the cost of other services The City provides;

- The City's financial capability;

- existing market conditions and anticipated demand as they relate to the proposed expenditure; and

- the impact of these decisions on the provision of gas, electric, telephone and cable services (Calgary Plan, 2-2.2.2.1I).

2

Purpose of the Update

This report assesses Calgary's current residential land inventory as well as expected supply/demand conditions for the coming five year period (2000-2004). This information base is up-dated annually, under the Short-Term Growth Management Strategy, as approved by Council in February, 1985.

The report is intended to be used in two ways:

- to provide a common information base and set of forecasts (related to the next 5 years' growth) to support facilities planning and budgeting by civic departments; and
- to provide the Growth Management Steering Committee with a detailed and up-to-date analysis of suburban growth dynamics, providing a framework in which to evaluate the merits of individual requests for new service extensions in suburban areas.

Appendix I provides a detailed look at historical information and future estimates on residential growth in the form of tables, figures and maps.

Appendix II of this report also provides an overview of residential growth areas on a sector by sector basis.

The information base has been developed jointly by staff in several civic departments, coordinated through the Interdepartmental Growth Management Technical Committee. The Committee includes representatives of the following portfolios:

Land Use & Mobility
Utilities & Environmental Protection
Engineering and Environmental Services
Community Vitality & Protection
Emergency Medical Services
Corporate Services
Strategic Services
Calgary Public Library

In addition, representatives from the Calgary Board of Education and the Calgary Separate School Board actively participate on the Technical Committee. In preparing this report, the Committee also consulted with representatives of the Urban Development Institute and the Calgary Region Home Builders' Association.

3

Economic Outlook: 2000 - 2004

Calgary's overall economic prospects for the coming five year period were reviewed by The City's Corporate Services in October of 1999. Some of the conclusions of this analysis are summarized below.

- Five year forecast for the Calgary economy:

	2000	2001	2002	2003	2004
Inflation Rate (%)*	2.0	2.0	2.0	2.0	2.0
Population (000's)**	864	883	902	920	938
Net Migration (000's)**	14,900	12,100	11,800	11,600	11,100
Unemployment Rate (%)**	5.9	5.8	5.7	5.7	5.6
Total Housing Starts**	7,750	7,950	7,800	7,400	7,500

* Annual % change
** Annual level

- Reduced of net migration will contribute strongly to overall reductions in housing demand in Calgary over the forecast period. The rapid levels of population growth over the past few years (of some 25,000 to 30,000 persons per year) is expected to decline to approximately 20,000 persons per year. Less migration also reduces the demand for townhouses and single family dwelling units. As a result, total housing activity is expected to decline to approximately 7,500 - 8,000 units per year over the five year period.

- Apartment vacancies have risen by 2.9% over the past year to a current level of 4.4%. While a substantial number of new apartments have been oriented towards seniors accommodation, rising vacancy rates and declining demands are expected to reduce new apartment construction over the forecast period.

4

Population Growth: 2000 - 2004

Calgary's population grew from 819,334 in April 1998 to 842,388 in April 1999, an increase of 23,054 people, or approximately 2.81%. Natural increase (births over deaths) accounted for an increase of about 7,425 people. Net migration, on the other hand, decreased significantly, to a level of 15,629 from 21,735 the previous year (refer to Figure 1).

City population forecasts produced in October, 1999 suggest that Calgary's population will increase by approximately 96,000 people by 2004 (Table 2). Net migration over this period is forecast to remain relatively stable in the 11,00 to 15,000 persons per year band. This level of net migration will result in total population growth averaging 20,000 persons per year over the forecast period or approximately 2.2% population growth per year. Figures 2 and 3 compare this forecasted level of growth with that experienced since 1987.

5

Housing Forecasts: 2000 - 2004

The demand for new housing is driven by both an increase in the number of households (e.g., an increasing population and/or changes in its composition) and changes in consumer housing needs/preferences (e.g., the "move-up market," where consumers choose a newer or larger house). In turn, the make-up of the population creating a demand for housing at any point in time will affect the level of demand in particular sectors of the city, as some areas have traditionally served specific market segments.

The focus here is on the demand for new single family and duplex housing units. This development continues to account for most of the new housing activity in the city (Table 4). It generally occurs in new suburban areas, and is the driving force behind the demand for most new subdivision. This new subdivision, in turn, creates a need to extend and up-grade municipal infrastructure. As a result, the manner in which housing demand is distributed in the marketplace among the various sectors of the city affects the need for and timing of substantial expenditures by The City to service new growth areas.

The anticipated level of demand for new single family/duplex housing is provided in Table 2. In 1998, there were 8,157 single family/duplex housing starts within the city, which decreased to 5,954 starts in 1999 (Table 4). **It is expected that the demand for new single family/duplex units will increase slightly in 2000, followed by a slight decrease in 2001 and beyond. This is consistent with the population growth forecasts discussed in Section 4 (see Table 2) and will result in an increase of approximately 30,350 new units (city wide) between 2000 and 2004.** Figure 4 places this forecasted demand in the context of additions to the single family/duplex housing stock since 1987. Table 4 details housing construction activity over the past five years.

While most housing growth is occurring in new suburban areas, there is also evidence that a small proportion (6% over the last five years, see Table 13) of new single family/duplex starts are located in existing, developed neighbourhoods. This occurs through single family infill/redevelopment in older inner-city communities, as well as construction on vacant lands remaining in various locations throughout the city (the distribution of 1999 single family building permit applications is illustrated in Map 3). A change from previous reports is taking this percentage out of forecasts for the developing communities.

In this report, forecasts combine single family and two family (duplex and semi-detached) housing units as their land needs and servicing requirements are generally similar. Therefore, references which were made to single family units/lots in previous editions of this report now make reference to figures related to single family/duplex units/lots.

With the exception of Table 5, references to multi-family lots/units throughout the report refer to a combination of townhouses and apartments. In part, Table 5 serves to address the market share distribution of multi-family housing, particularly between developing communities in the suburbs and the remainder of the city. The market share is discussed in more detail in Section 7.

6

Suburban Residential Land Requirements: 2000 - 2004

The demand for residential land in the short-term is calculated on the basis of **an average density of 6 units per gross residential acre.** This reflects the average density of outline plans submitted in 1997 to 2000 for suburban communities developing in Calgary. Densities proposed and achieved will continue to be closely monitored so that estimated short-term land requirements can reflect current market conditions to the greatest extent possible.

Average densities in developing communities have been increasing slightly in recent years. It is expected that demographic and market changes will lead to a gradual increase in the proportions of multi-family units and smaller houses/lots being developed. This is already occurring in some communities and is consistent with policies contained within the *Calgary Plan,* encouraging innovative approaches in the design and development of new communities. This will prompt an increase in overall densities, in the variety of housing types, and in the capability for new housing to be integrated beyond the initial buildout of a community *(Calgary Plan 2-2.2.2B).* The Calgary Plan endeavours to ensure that new communities will work, over time, to achieve a target overall density of 6 - 8 units per gross residential acre *(Calgary Plan 2-2.2.2C).* However, it is not expected that these changes will significantly affect land absorption rates in the immediate future because there is an existing inventory of serviceable land with policy and land use approval already in place. It will take time for new policy directions to be reflected in the marketplace.

The density of individual communities varies, depending on the mix of housing types (i.e., the proportion of single family/duplex and multi-family units), single family/duplex lot sizes, and the extent of other land uses and amenities within the community, (e.g., local commercial sites, school sites, open spaces and transportation facilities). However, these variations are site-specific and, in terms of their impact on overall land requirements, should not affect the expected timing of utility extensions at the sector level.

Table 2 provides a breakdown of the annual land requirements associated with forecasted housing demand and the assumed 6 units per acre density through to the year 2004. **Approximately 5,060 gross residential acres of land will be required in suburban locations between 2000 and 2004 to support single family/duplex unit development — ranging between approximately 1,000 and 1,200 acres per year.** Sections 7 and 9 of this report describe the manner in which the demand for serviced land has been distributed in the past. As well, they forecast the expected distribution of future demand. Tables 13 and 14 provide estimates of the distribution of housing construction and land absorption, by sector, through the five year forecast period.

7

Indicators of Market Share, by Sector

Building Permit Statistics

Calgary's Building Permit figures indicate the increase in dwelling units in developing communities and provide one indicator of past market performance. The distribution of this increase in units over the last five years, by sector, is provided in the upper portion of Table 5. The delineation of sectors is illustrated on Map 1.

With respect to single family/duplex new building permits, the Northwest, North and Southeast sectors have been the city's strongest growth areas over the past five years. In combination, these three sectors have accounted for roughly 64% of the new suburban single family/duplex market since 1995. All three sectors have seen a relatively stable and substantial market share, accommodating about 57% of the market in 1999. Over the past five years, the Northeast, East and West sectors have accounted for smaller, although relatively stable shares of the market.

The share of total suburban single family/duplex growth achieved by each sector from 1995 to 1999 is illustrated in Figure 6. The distribution of market share for the 1999 is shown in Figure 7.

For multi-family (including apartments and row housing), the West, Northwest and South sectors have shown the highest concentration of development, together accounting for roughly 79% of the new suburban multi-family market since 1995. The West and Northwest sectors continue to accommodate significant proportions of this development. However it is important to note that multi-family market shares tend to be less stable with regard to sector locations than single family and shares can fluctuate yearly.

Building Permit Applications

Market share in the short-term is probably best reflected in the distribution of recent approved building permit applications for new units.

Table 6 and Figure 8 provide the distribution of single family/duplex building permit applications in 1998. The distribution of permit applications for 1999 are shown in Table 7 and Figure 9. The location of 1999 single family building permit activity is also illustrated on Map 3. These data indicate that construction activity in some of the sectors has had some significant shift in percentage market share from 1998 to 1999.

The lower half of Table 5 shows the market share distribution of building permits for multi-family housing units between the suburbs and the remainder of the city from 1995 - 1999. Comparisons are shown between development activity in the suburban sectors and the remaining Central sector, as well as between developing communities (i.e. those suburban communities currently experiencing construction of new units) and the remainder of the city.

When multi-family housing is defined as including duplexes, apartments and row housing, an average of 71% of new multi-family development occurred in the **suburban sectors**: the remaining 29% occurred in the Central sector. Comparatively, an average concentration of only 49% of this same mix of unit types was located in **developing communities**, with the other 51% being developed in the remainder of the city.

The final comparison in Table 5 removes duplexes from the multi-family unit mix. However, the distribution between **developing communities** and the remainder of the city stays relatively constant: an average of 47% of multi-family development occurred in developing communities.

1999 Developer Survey

Each year Utilities and Environmental Protection (City of Calgary) surveys the development industry to determine areas where individual developers anticipate undertaking development and which would, therefore, require the extension of utilities in that year. The results of the most recent survey are contained in Table 8. The lands referred to in Table 8 are located, generally, on Map 2.

It is important to note that this distribution of market expectations reflects the unique circumstances in each sector with respect to the availability of serviced land, and not necessarily the expectation of immediate housing construction. The timing and scale of servicing and subdivision expectations often relate to a slightly longer time horizon and may be more directly affected by marketing strategies of individual developers.

Housing Starts

In 1999 there were an estimated 9,253 total housing starts in Calgary, of which 5,524 (60%) were for single family units. An additional 430 (5%) starts were for duplex units (Table 4).

As indicated in Table 4 and Figure 20, single family/duplex units continue to dominate the new housing market on a city-wide basis. The multi-family share of new housing starts represented 35% of total starts in 1999, with construction starting on 3,299 new townhouse and apartment units. This is an increase of 11% over 1998.

The demand for new townhouse and apartment units may or may not grow over the medium-term (6 - 10 years) and a significant proportion of these new projects will be constructed in new suburban communities. However, in these areas, overall population growth, land absorption and service needs over the next five years will still be driven primarily by an increasing market for single family/duplex units.

Subdivision Activity - Outline and Tentative Plan Applications

Figure 13 illustrates the number of acres submitted for outline plan approval annually since 1987. While volumes declined sharply to 758 acres in 1995, they recovered to 1,923 acres in 1996 and to 2,632 acres in 1997. In 1999, 1,836 acres were submitted for outline plan approval which was consistent with 1998 (1,897 acres) levels.

Figure 14 shows the number of lots (primarily low density residential) submitted annually since 1987 for tentative plan approval—the next step in the subdivision process. Volumes fell sharply in 1995, to 3,734 lots, the lowest level since 1988, but this was followed by a similarly sharp increase in 1996 (6,204 lots) and a second sharp increase in 1997 (9,209 lots). In 1998, a fourteen year high of 10,049 lots were applied for. In 1999, 7,307 lots (a steep decrease) were submitted for tentative plan approval.

The slow down of subdivision activity in 1999 reflected, in part, relatively high lot inventory levels coming out of 1997/1998. Subsequent high levels of activity reflect strong population growth and associated demand for new housing.

8

Land Available for Residential Development, by Sector

Land considered available as of Spring 1999 for residential development in the suburban market included vacant lots in new suburban communities, land in the process of being subdivided, and those remaining lands which are as yet unsubdivided, but which are identified for future residential use. The status of this supply is changing constantly as approved lots are registered and serviced, as construction begins on vacant lots, and as plans are developed or amended. The intent here is to provide an accurate assessment of overall residential land supply, reflecting conditions as of Spring 1999.

Current Single Family / Duplex Lot Inventory

A detailed estimate was made of the current inventory of single family and duplex lots, both vacant and under construction, in suburban areas in April 1999. Approximately 10,606 vacant lots existed at that time, including those which were serviced and available to builders as well as lots recently approved through tentative plans of subdivision. This inventory was consistent with the April 1998 inventory, which totalled approximately 10,765 vacant single family/duplex lots. It can accommodate between one and two years of supply at current construction levels.

The estimated suburban single family/duplex lot supply, by sector, is detailed in Table 10. The distribution of vacant lots is illustrated in Figure 15.

Vacant Residential Lot Inventory

Historically, data on the number of vacant residential lots has been available from The City's Electric System. Until December 1996, they compiled an annual survey of vacant fully serviced suburban residential lots **(with shallow utilities in place)**. This source has been replaced with information from the Calgary Chapter of the Urban Development Institute (U.D.I.). Annually, since January 1997, they have compiled a survey of vacant suburban residential lots which may or may not have shallow utilities in place. In January 1999, there were approximately 8,161 serviced, vacant lots, as shown in Table 11 and Figure 16. This inventory was larger than the approximate 7,741 lots recorded in 1998.

Unsubdivided Residential Land Supply

The current unsubdivided suburban residential land supply is indicated, by sector, in Table 12. The distribution of that land supply is shown on Figure 17. **Overall, as of April 1999, there were an estimated 15,713 gross residential acres intended for residential and related uses. Given lot counts from approved outline and tentative plans for both single family/duplex and multi-family units, as well as an assumed density of 6 units per gross residential acre for currently unsubdivided areas, these lands could accommodate approximately 100,000 new residential units.** Map 6 shows the unsubdivided residential land supply for the entire city (all three colours), while detailed maps of the residential land supply, by sector, are contained in Appendix II.

It should be noted that this inventory does not include large areas of land annexed to the city in 1989 or those areas for which future land use policy has not yet been developed. These excluded areas are shown in Appendix II. They will ultimately accommodate a wide range of uses in addition to residential; including industrial, commercial, recreational, environmentally significant areas, and lands for major transportation facilities and public services. They will continue to be excluded from the residential land inventory until formal planning policies are in place and/or more extensive technical analysis is undertaken to determine the likely developable residential components.

The lands included in the inventory are classified according to the availability of water and sewer (storm and sanitary) services, as this infrastructure must be in place before development can proceed.

Areas classified as having "Utility Capacity in Place" indicate that major utility services have either been installed or will be provided by the developers without major City expenditures, although the land is currently neither subdivided nor developed with on-site services. The two remaining classes describe lands with some, but not all, utility capacity in place ("Some Utility Capacity in Place") or lands having no capacity in place ("No Utility Capacity in Place").

In Appendix II, lands within each sector are mapped according to servicing status. These servicing maps **do not** take into account the availability of downstream transportation capacity, which is discussed throughout the text, nor do they indicate the costs to construct the required services. **It cannot be assumed that areas having "some" capacity in place are necessarily less costly to service (including transportation infrastructure) than those having "no" capacity in place—their relative**

cost depends very much on the unique circumstances in each area. In light of this, the coding of these two categories should not be construed to imply the intended sequence of development. Generally, servicing costs and attractiveness to the market have been the main determinants of when individual areas are brought on-stream. More specific information about servicing thresholds/constraints/sequences will be provided through the Growth Area Management plan (GRAMP).

As noted above, transportation requirements may impose a further constraint on development, but the extent of constraint may vary from situation to situation. Although the required transportation facilities may be substantial in some situations, there is a greater degree of flexibility in the timing of the expenditures. Transportation facilities are not generally required in their final form until substantial development has occurred. Notwithstanding this, it must be emphasized that some of the areas discussed below, while having all or some utility capacity in place, may also have major transportation constraints which affect their developability in the 2000–2004 period (refer to Section 9).

It should also be noted that although The City may not be responsible for constructing major servicing projects in areas with utility capacity in place, it will still need to budget for "oversize" costs associated with specific transportation and utility improvements constructed by individual developers. "Oversize" costs are recovered from developers and in the case of transportation costs, they are recovered by means of major road assessments upon new developments.

Finally, it is noted that this servicing analysis **does not** take into account the related need for other public facilities (e.g., recreation facilities, libraries, fire stations) or services (e.g., transit, police, fire, EMS, social services) also required to support growth generally and/or in a specific area.

▪ Areas with "Utility Capacity in Place"

With the exception of the East sector, a supply of land exists in each sector which is immediately developable in the sense that capacity in all major water and sewer (storm and sanitary) facilities are in place. These areas are shown in "red" on the maps included in Appendices I and II.

These lands are not, as yet, subdivided, nor do they have local "on-site" services in place. There is, however, capacity in the utility "system" to accommodate their development without requiring significant City expenditures for major trunks, watermains, reservoirs, etc. In this sense, they are considered to have utility capacity in place. "Significant expenditures" would include servicing elements which are normally included in the acreage assessment charges, but do not include regular development-related costs such as boundary and oversize payments. **Of these areas, those with specific transportation system constraints are identified in Section 9.**

These areas represent approximately 6,160 acres, of which 371 acres are identified for multi-family use. This is up from approximately 5,200 acres in 1998, including 286 acres for multi-family. **In total, areas with utility capacity in place in 1999 could accommodate approximately 34,000 single family/duplex units and 8,000 multi-family units.** These lands are distributed by sector in Table 12 and are illustrated in Figure 18.

It is to be noted that although each of these areas, in isolation, could develop without major expenditures for water and sewer lines, **the cumulative effects of simultaneous development in all of these areas could result in a need for improvements in the facilities.** Additional capital projects (treatment plants, reservoirs, etc.) will be required to meet increases in city-wide service demands as the city grows. **Full development of many of these areas will also require major transportation improvements and provision of a variety of necessary public facilities and services.** It is intended that these cumulative requirements will be identified and monitored through the Growth Area Management Plan (GRAMP) process.

- **Areas Having "Some Utility Capacity in Place"**

In the areas having "Some Utility Capacity in Place" (identified in green in Appendices I and II), **capacity exists in at least one major municipal utility (storm sewer, sanitary sewer or water).** In each instance, additional capital expenditures are required by The City before large-scale development can commence. **The areas designated as having "Some Utility Capacity in Place" total approximately 4,830 acres** (down from 6,900 in 1998) **and could accommodate approximately 28,500 units.**

The full development of many of these (green) areas, on a sector basis, will require major transportation expenditures.

- **Areas Having "No Utility Capacity In Place"**

The third category of lands (shown in blue in Appendices I and II) includes all of the remaining unsubdivided lands which are identified through Policy Reports, Area Structure Plans (either approved or in preparation) and new Community Plans, and are identified in the Calgary Plan, as having a future residential land use. **These lands represent approximately 4,700 acres in total** (down from 5,300 in 1998) **and could accommodate approximately 29,000 units.**

The full development of these areas will require major transportation improvements as well.

9

Probable Supply/Demand Conditions, By Sector

A key purpose of the Short-Term Growth Management Strategy is to examine, on an annual basis, the expected fit between residential land demand and supply over the coming 5 year period. **The intent is to identify whether a sufficient supply of readily developable land exists, in a variety of locations, to facilitate competitive land and housing markets.** The comparison of supply and demand is based upon a set of assumptions regarding the level of population growth, the character of housing demand and the expected distribution of that demand among the competing growth corridors. As the market changes, these assumptions can be expected to change as well.

Section 7 of this report provides a basis for estimating the expected market share of single family/duplex housing starts in the short-term, although **it is recognized that major shifts in activity can and do occur from time to time as a result of individual developers opening-up or completing particular subdivisions.**

Table 13 provides estimates of the number and distribution of new single family/duplex starts, by sector, over the 2000–2004 period. This distribution, by sector, is illustrated in Figure 19. Table 14 estimates the annual demand for residential land, in each sector, and relates these demand forecasts to the existing inventory of unsubdivided land with "utility capacity in place." Supplementary information related to the rate of development, land supply, and remaining housing and population capacity within the individual communities in each sector is contained in Appendix II. It should be noted that, as of this year, more detailed estimates, dealing more specifically with just the developing areas of the suburbs has been provided. Table 13 now estimates needs for the developing communities, rather than the whole sector as previously done.

Map 8 provides an overall view of the possible distribution of both housing growth (approximately 28,500 single family/duplex and 4,100 multi-family units) and population growth within developing areas over the next five years, based on the assumptions and forecasts outlined in this report.

North

- The North sector has accounted for a 21% share of the new single family/duplex market since 1995, with development occurring mainly in Country Hills, Coventry Hills, Harvest Hills, Hidden Valley, and Panorama Hills. As can be concluded from Table 5 and Figure 6, on average, the sector has added 1,200 single family/duplex units per year over the past five years. Figure 7 indicates that more recently, the sector accounted for 17% of the suburban single family/duplex market growth in 1999, adding 982 units through building permit applications.
- As of April 1998, the North sector had an inventory of 1,588 vacant single family/duplex lots and 315 acres of unsubdivided land with utility capacity in place, able to accommodate an additional 1,573 single family/duplex units.

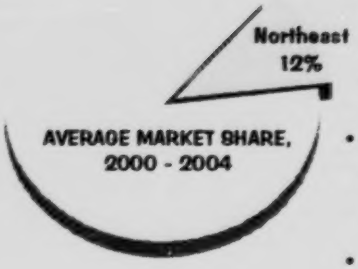
North
20%
AVERAGE MARKET SHARE,
2000 - 2004

- It is expected that the sector's market share will average 20% or approximately 1,000 to 1,200 houses per year over the next five years.
- Twinning of some major roads (i.e., Shaganappi Trail, Harvest Hills Boulevard) will be required to facilitate development. Twinning of Country Hills Boulevard west of Beddington Trail and Beddington Trail was completed in 1999.
- Twinning of Country Hills Boulevard east of Beddington Trail, including a new bridge over West Nose Creek is to be started in 1999 with completion in 2000.
- Because of its proximity to Deerfoot Trail, development in the North sector is desirable in terms of the transportation system. However, the interchange at Deerfoot Trail and Country Hills Boulevard has experienced substantial traffic growth and is now experiencing significant delays. The interchange at Country Hills Boulevard and Deerfoot Trail is being upgraded by Alberta Infrastructure. This includes twinning the existing bridge and two loop ramps. Construction started in 2000 and will be completed in 2001.
- With the exception of the Deerfoot Trail/Country Hills Boulevard interchange, access to the area should remain relatively good, due to the 1999-2000 provision of upgraded road infrastructure such as widening of Country Hills Boulevard. New signals have been installed on Country Hills Boulevard and Harvest Hills Boulevard in 1999.
- The Province has completed the Stage 1 functional design for Stoney Trail from Deerfoot Trail west to Crowchild Trail. The budgets have not yet been allocated for construction of Stoney Trail and The City is presently negotiating with the Province.

- The Province is undertaking the upgrade of the entire Deerfoot Trail, including the construction of the interchange at 96 Avenue and Deerfoot Trail currently underway.

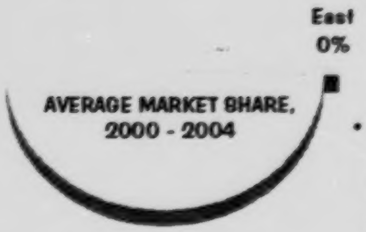
Northeast

- The Northeast sector has achieved an average single family/duplex market share of 10% since 1995, On average, the sector has added 610 single family/duplex units per year over the last five years. In 1999, the Northeast accounted for 13% of the suburban single family/duplex market or 730 new units through building permit applications. This increase reflects a capacity of serviced land to the balance of the subdivided land in the sector. As a result, market share increased between 1998 to 1999 from 5% to 13%.
- Development is ongoing in the Saddleridge, Coral Springs, Martindale, Monterey Park, and Taradale areas. The sector is expected to average approximately 12% of the market through to 2004, or 650 to 700 new single family/duplex units per year.



- As of April 1999, the Northeast sector had a total inventory of 1,223 vacant single family/duplex lots and 1,351 acres of land with utility capacity in place, able to accommodate 9,200 additional single family/duplex units.
- Area developers are moving ahead with construction of 80 Avenue NE, 60 Street NE and the Saddleridge loop road.
- The extension of 36 Street NE from 64 Avenue NE to 80 Avenue NE was completed this year. Pressure on McKnight Boulevard will be eased when The City/Province/Airport construct the new 96 Avenue NE connection from Deerfoot Trail to the Airport. Construction is anticipated in 2000.
- Access to the area in the afternoon peak hour continues to be constrained by congestion on McKnight Boulevard and 32 Avenue NE. This congestion, while eased somewhat by the recent widening of McKnight Boulevard to 36 Street NE, will increase as residential and commercial development continues in the sector. The widening of McKnight Boulevard between Barlow Trail and 36 Street has been completed and is currently operating on three lanes each way. Developer funded widening of the west half of Barlow Trail, from TransCanada Highway to McKnight Boulevard is planned for 2001.
- At the direction of City Council, the Planning & Transportation Policy is planning improvements to Barlow Trail and 32 Avenue NE. These improvements will also be partially funded by area developers. In conjunction with new industrial development, 39 Avenue NE will be constructed from Barlow Trail to 36 Street NE.

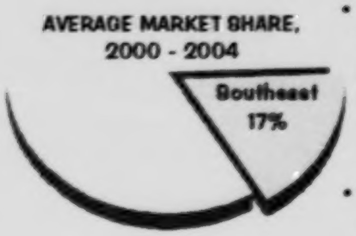
East



- The East sector has achieved an average single family/duplex market share of 3% since 1995, with development occurring in Applewood Park and Erin Woods. On average, the sector added 200 single family/duplex units per year over the last five years. More recently the sector accounted for 1% of the suburban single family/duplex market in 1999, adding 84 units based upon approved building permit applications.
- It is expected that the sector will capture a 0% market share over the next year. It will likely be fully built-out in 2000. As of April 1999, the East sector had a total inventory of 43 vacant single family/duplex lots. This inventory represents the only remaining residential capacity within the sector with no new plans to add more residential capacity to the sector.

Southeast

- The Southeast sector has achieved an average 16% share of the suburban single family/duplex market since 1995, or approximately 1,000 units per year. More recently, the sector accounted for 11% of the market in 1999, adding 632 units through building permit applications. This drop over last year is primarily due to the build-out of Mckenzie Lake and the early stages of Cranston coming on stream. As with any new developing area initial start up is typically slow but the sector is expected to pick up to historical levels as Cranston develops.



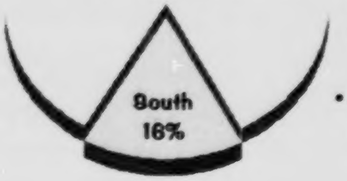
- Development is ongoing in Douglas Glen/Barlow, Cranston, and McKenzie Towne, and is almost completed in McKenzie Lake and nearly completed in Douglasdale. The sector is expected to average approximately 17% of the market through to 2004, or 800 to 1,100 new single family/duplex units per year.
- As of April 1999, the Southeast sector had a total inventory of 912 vacant single family/duplex lots and 826 acres of land with utility capacity in place, able to accommodate 5,200 additional single family/duplex units.
- If the sector is to continue to accommodate it's current share of the market, additional serviced land capacity will likely be required in 2000-2001.
- Deerfoot Trail continues to provide good access to developing areas in the sector. The Province has allocated funds to upgrade Deerfoot Trail including interchanges at 130 Avenue, McKenzie Lake Boulevard and Douglasdale Boulevard (in progress). These upgrades should be completed by 2002.
- Construction on the south extension of Deerfoot Trail from Marquis of Lorne Trail to Highway 2 will begin in 2000. This will include an interchange at Marquis of Lorne Trail.

- Progress is being made on the construction of 24 Street SE from Glenmore Trail to 114 Avenue, as development of the area occurs.
- The twinning of Glenmore Trail between 52 Street SE and Barlow Trail and Barlow Trail between Glenmore Trail and Deerfoot Trail are currently underway with anticipated completion in 2001.
- Corporate Properties are proceeding with the construction of 52 Street SE between the WID (Western Irrigation District) canal and 114 Avenue SE.

South

- The South sector has accounted for a 15% share of the single family/duplex market growth since 1995, adding 900 single family/duplex units per year on average. The sector's share was 18% in the 1999, adding 1,047 units through new building permit applications. This increase is somewhat explained by the southeast sectors drop in market share over the last year and some of that market moving to the south sector. However, historical levels are expected to return to the sector.
- Development continues in Bridlewood, Chaparral, Evergreen, Millrise, Shawnessy, and Somerset. Overall, the sector is expected to account for approximately 16 % of the single family/duplex market over the five year period, or an average of 900 units per year.

AVERAGE MARKET SHARE, 2000 - 2004



- As of April 1999, the South sector had a total inventory of 1,769 vacant single family/duplex lots and 1,063 acres of residential land with utility capacity in place, able to accommodate approximately 6,156 additional single family/duplex units.
- The existing inventory of serviced land in this sector should be sufficient to satisfy expected demand through the forecast period and beyond. No additional utility extensions are likely to be required in the short-term.
- Traffic flows along Marquis of Lorne Trail will be impacted by development of Chaparral and the connection of Chaparral Boulevard to Marquis of Lorne Trail. With the extension of Deerfoot Trail south of Marquis of Lorne Trail underway, the need for upgrading of Marquis of Lorne Trail will be revisited.
- Construction of the Macleod Trail/Anderson Road interchange, began in 1999. The completion date is 2001.
- James McKevitt Drive SW will be completed in 2000 - 2001 and will provide a high quality north-south route (to major standards) west of Shawnessy and Millrise.

- Other transportation improvements are planned in the Shawnessy Centre area to improve traffic flow, including construction of Shawville Link and Shawville Gate which enhances access to the area.

- Full development of the Midnapore III area will require the extension of Sarcee Trail from Anderson Road to Spruce Meadows Trail South (formerly Marquis of Lorne Trail). The Midnapore III Community Plan development area has been capped at 3,000 residential units. Additional Outline Plans and Land Use Amendments have been processed however, they have been tabled by Council prior to final land use approval until the Sarcee Trail extension, including the 37 Street Bridge upgrade is available.

- City Council has approved the Southwest extension of the LRT to 146 Avenue. It under construction with a scheduled opening date of 2002. The interchange at Macleod Trail and Anderson Road, as a part of this extension is also currently under construction. An LRT extension to the 162 Avenue station is currently under review to determine timing of construction.

West

- The West sector has held a fairly consistent share of the suburban single family/duplex market since 1995, averaging 8% or 450 units/year. The sector achieved a 10% market share in 1999, adding 575 single family/duplex units through new building permit applications. It is expected that after the next five year period growth in this sector will increase to higher levels than the historical past, as the Northwest Sector land supply begins to decrease.

- Development is continuing in Strathcona, Discovery Ridge, West Springs, Signal Hill, and Springbank Hill. It is expected that single family/duplex demand in the sector will increase to an average of 10% of the suburban market through to 2004, or approximately 500 to 600 new houses per year.

AVERAGE MARKET SHARE, 2000 - 2004

- As of April 1999, the West sector had a total inventory of 1,410 vacant single family/duplex lots and 872 acres of land with utility capacity in place, able to accommodate an additional 3,910 single family/duplex units.

- The existing serviced land inventory in the sector should be sufficient to meet demands through the forecast period.

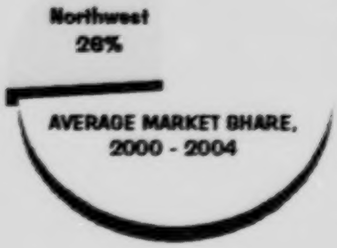
- Several significant road and access improvements are proceeding in the West Sector. The new access to Lower Springbank Road areas north of Highway 8 was completed this year. Construction of the new access to Discovery Ridge on Highway 8 has been completed. North of this intersection, upgrading of 69 Street SW to major road standards from Highway 8 to 34 Avenue SW is currently underway.

- The City has approved construction of the extension of Bow Trail from Old Banff Coach Road to 85 Street NW. This project was made possible with special provincial funding and the assistance of area developers. As well, area developers are upgrading sections of Old Banff Coach Road west of 69 Street SW.

Northwest

- The Northwest remains the city's largest and strongest growth corridor and has averaged a 27% share of the new single family/duplex market or 1,600 units per year since 1995. The sector continued to maintain a strong market share (29%) in 1999, adding 1,638 single family/duplex units through new building permit applications.

- Housing construction was active in nine communities in the sector in 1999: Arbour Lake, Citadel, Edgemont, Rocky Ridge, Royal Oak, Scenic Acres, The Hamptons, Tuscany, and Valley Ridge. As well, a Community Plan is being prepared for the area of Symons' Valley.



- It is expected that activity in the sector will remain strong over the forecast period, averaging 26% of the single family/duplex market or about 1,300 to 1,600 units annually.

- As of April 1999, the Northwest sector had a substantial inventory of 3,661 vacant single family/duplex lots and 1,733 acres of land with utility capacity in place, able to accommodate roughly 8,300 additional single family/duplex units.

- The existing inventory of serviced land should be sufficient to accommodate expected demand throughout the five year forecast period and beyond. No further extensions of major utilities are likely to be required in the short-term.

- Stoney Trail, having been constructed from the TransCanada Highway to Country Hills Boulevard, provides additional capacity to that currently available on the 85 Street NW bridge.

- Construction of Country Hills Boulevard is now completed from 85 Street NW to Deerfoot Trail, providing a direct route from Highway 1 in the west to Highway 2 North. Traffic signals will be added when required. Twinning will be completed in 2000.

- Many intersections along Crowchild Trail are now operating at capacity. New growth in this sector will contribute to increased congestion and may lead to more short-cutting problems through residential neighbourhoods. City Council has approved several transportation initiatives to alleviate some of this concern. Under way is the extension of LRT to 53 Street/ Dalhousie Station, including a Park n' Ride lot. Another initiative is the construction of the Crowchild/Shagganappi Trail Interchange which is scheduled to open later this year. The construction of interchanges on Crowchild Trail at Brisebois Drive, Northland Drive and 53 Street NW is planned for 2001/2003. In conjunction with the construction of these interchanges, Crowchild Trail will be widened to six lanes.

- Upgrades to the TransCanada Highway/Valley Ridge Boulevard interchange should begin in 2000, including widening a section of TransCanada Highway from Valley Ridge Boulevard to Bowfort Road to 6 lanes. This widening will relieve congestion from commuter traffic coming from the West and Northwest sectors.

- A major rebuild of Rocky Ridge Road began in 1999, to service growth in Rocky Ridge and Royal Oak. An agreement is in place to stage upgrading of Rocky Ridge Road from two to four lanes and to construct Country Hills Boulevard from Rocky Ridge Road to Stony Trail.

10

Servicing Implications

The Need For Utility Extensions

The serviceable residential land supply, that is, the existing inventory of vacant single family/duplex lots and the unsubdivided areas with "Utility Capacity in Place" (the red areas in Appendices I and II), together provide enough capacity for an estimated 44,800 single family/duplex units or approximately 138,000 people. **These lands should provide sufficient inventory to accommodate expected demand through the five year forecast period, in terms of the total land requirement on a city-wide basis. However, there will be serviced land shortages in particular sectors within the next five years. Extension of City utilities will be required if these sectors are to remain open for development.**

The timing of utility extensions is to be reviewed in the context of the policies contained in the Calgary Plan. The following specific policies provide the basis for this review:

- *The City will endeavour to accommodate growth while at the same time attempting to avoid premature investment in municipal infrastructure (2-2.2.2.1G).*
- *Make decisions on capital expenditures relating to the extension and/or upgrading of municipal water, storm, sanitary, and transportation systems, through the normal budgeting process and after consideration has been given to: the overall capital cost implications of the extensions, including*
  - *the cost of other services The City provides;*
  - *the municipality's financial capability;*
  - *existing market conditions and anticipated demand as they relate to the proposed expenditure; and*
  - *the impact of these decisions on the provision of gas, electric, telephone and cable services. (2-2.2.2.1I)*
- *Evaluate actual expenditure decisions related to the construction of municipal infrastructure through The City's Short-Term Growth Management decision-making process. (2-2.2.2.1H)*

The Short Term Growth Management Strategy (approved in February, 1985) indicates that, through its normal planning and budgeting processes, The City will endeavour to incorporate sufficient lead times so that it can be in a position to construct the municipal infrastructure required to provide the supply of serviced land determined to be necessary under Calgary Plan policy 2-2.2.2.1l.

On the basis of the forecasts and allocations contained in this report, and if a reasonable float of lands with "Utility Capacity in Place" is to be maintained in each sector, The City should be prepared to consider undertaking or facilitating utility extensions over the next five years in the following sectors:

Sector	Probable Year in Which Utility Extensions Will be Required*	Utility Required to Service Areas with Some Capacity in Place** (green)
North	2000	sanitary and storm
Northeast	—	
East	—	
Southeast	2000 - 2001	water
South	after 2003	sanitary and water
West	after 2003	storm and water
Northwest	after 2003	water

**Utility extensions listed here are not meant to identify those required within the timeframe indicated in the previous column. It cannot be assumed that "green" areas will be logically developed before "blue" areas (areas with no capacity in place). "Blue" areas require storm, sanitary and water extensions.

Notwithstanding the overall availability of serviced land, it is expected that requests to extend utilities and transportation services into new areas will continue to be placed before The City.

Implications of the "Serviceable" Land Supply

In dealing with shortages in a particular sector, Council may or may not choose to expend funds to service new lands, given the availability of serviced land in other sectors. In considering such a choice, the following implications should be taken into account.

- The development of those areas shown to have major utility capacity in place offers several benefits, including:
  - minimizing the assumption of new debt by The City in accommodating growth in the short-term (i.e., not contributing to an increase in the existing debt/capita ratio);
  - reducing pressures on The City's operating budgets in terms of debt servicing and overall operating efficiencies;

  - expediting cash recoveries for those acreage assessment expenditures already undertaken in fully-serviced areas. Where there is only a fixed amount of new residential construction each year, development occurring on land requiring additional municipal services will delay the full development of existing serviced areas and extend the cost-recovery period for past City expenditures on acreage assessment infrastructure; and

  - maintaining current acreage assessment charges at manageable levels by minimizing the accruing interest which subsequent developments must finance over the extended time frame.

- On the other hand, limiting development to those lands having utility capacity currently in place may not satisfy all of the requirements of the marketplace with respect to:

  - providing a sufficient number of locational choices for each market segment;

  - providing a readily developable supply in each sector (if particular landowners choose not to develop or sell their lands within the 5 year period);

  - providing the blend of desired locations and marketable amenities to service particular market segments in each sector;

  - allowing individual landowners the flexibility to bring their lands on-stream when they wish, if the development of their lands requires major City expenditures (i.e., if their lands are within a partially-serviced or unserviced area).

- In addition, there may be other factors which influence the need for or timing of service extensions in particular areas and which are not strictly related to local demands for residential land. For example, specific service extensions may also satisfy demands for non-residential uses, such as industrial development, or resolve existing servicing problems in the sector.

It is within the context of these divergent interests that The City's growth management processes must:

  - provide a context for setting the budgeting priorities of each service department in relation to a shared view of the development pattern expected to emerge over the coming 5 year period; and

- provide current information upon which Council can respond to the requests of individual landowners situated beyond the fully-serviced areas.

The Short-Term Growth Management Strategy provides mechanisms through which Council can give balance and perspective to these varying interests in a consistent and rigorous way.

In addition to providing ongoing support to The City's capital budgeting process, this Strategy has also served as the basis for a number of recent cost-sharing agreements on the extension of services into new areas. Specifically, cost-sharing arrangements between The City and area developers have been approved for:

- Country Hills Boulevard NW extension;
- Harvest Hills (transportation improvements);
- Panorama Hills (transportation improvements at Country Hills Boulevard/ Deerfoot Trail interchange);
- Martindale (sanitary and storm sewers);
- McKenzie Lake and McKenzie Towne (sanitary and storm sewers);
- Shawnessy/Somerset (storm sewers and transportation);
- Patterson Heights (sanitary and storm sewers);
- Strathcona Cell H (sanitary and storm sewers);
- Arbour Lake (storm sewers);
- Crestview (waterworks)
- Crowchild IV/Hamptons (transportation improvements);
- Rocky Ridge (sanitary and storm sewers and transportation);
- Valley Ridge (sanitary sewers and transportation); and
- West Scenic Acres/Tuscany (sanitary and storm sewers and transportation improvements);

Servicing Implications By Sector

This section briefly describes the major **utility requirements** to service future residential development in each sector (the "green" and "blue" areas shown on Maps 1 to 7 in Appendix II). It also identifies, on a sector by sector basis, the major transportation infrastructure that may be required in the short-term to service development in these areas. However, notwithstanding the identification of these infrastructure requirements in this report, there is no assurance that individual elements will actually be constructed in the short-term, as a result of capital funding constraints.

It should be recognized that **this report does not address the downstream transportation impacts generated by suburban growth**. Many downstream intersections are currently at capacity and failing during peak periods. Map 5 in Appendix I shows locations of capacity problems at signalized intersections where one or more movements are at failure during one or both peak periods. Congestion at major signalized intersections often leads to increasing volumes of short-cutting traffic through residential areas. As a result, more action is required to mitigate the impact from new development on existing communities.

▪ North Sector

- Calgary North - Coventry Hills and Panorama Hills:
  - The "green" area in Coventry Hills requires resolution of design and financing issues for the storm sewer system. A small additional area is serviceable by storm sewer. After this limit is exceeded, the construction of a new storm outfall to Nose Creek, with a new trunk along 112 Avenue NW will be required with resolution of financing issues.
  - Development of the "green" and "blue" areas (Panorama Hills) requires extensions of sanitary sewer trunks, and this "blue" area also requires construction of the Spyhill North pump station, phased water feedermain extensions within the Spyhill North pressure zone, and a second cell at the Spyhill East reservoir.
- Growth in the North and Northeast Sectors will at some time require construction of the Big Hill East reservoir (to be located on the western edge of Nose Hill Park), and phased extension of the Shaganappi water feedermain between the Big Hill pump station and the Beddington reservoir.
- Because of its proximity to Deerfoot Trail, development in the North sector is desirable in terms of the transportation system. However, the interchange at Deerfoot Trail and Country Hills Boulevard has experienced substantial traffic growth and is now experiencing significant delays. City Council have indicated that additional landuse approvals in this sector will be constrained until such time as the Country Hills Boulevard bridge over Deerfoot Trail is twinned.

Northeast Sector

- Constructed in 1997 - 1998, the storm and sanitary acreage assessment trunk in Saddle Ridge is now complete.
- Development of the "red" area in Saddle Ridge (north of 80 Avenue) required the construction of the Falconridge Boulevard water feedermain (Phases 1A and 1B as per the 2000 Capital Budget).
- McKnight Boulevard (52 Street E. - 68 Street E.) may require upgrading to four lanes in the short-term depending upon the absorption of lots and growth in traffic volumes in the sector.

East Sector

- No "red", "green" or "blue" areas exist. No further additions to the residential land base are expected for this sector in the short to medium-term.

Southeast Sector

- McKenzie Towne:
  - Full build-out of the "blue" area will require extension of a sanitary sewer trunk, resolution of design and financing for the storm sewer system, and phased water feedermain extensions on Deerfoot Trail between 114 Avenue and 162 Avenue SE (this has been pushed ahead due to the transfer of Deerfoot Trail to the Province).
- Cranston
  - Development of the "green" area requires water system improvements and feedermain extensions.
  - Development of the "blue" area requires water transmission system improvements, including phased feedermain extensions, a new reservoir, and a new pump station. Extension of a developer funded sanitary sewer trunk, and provision and resolution of associated financing of a new storm water outfall to the south is also required.
- Homesteads:
  - Development of the "green" area requires water system improvements and feeder main extensions. Storm sewer and sanitary sewer servicing will be available through trunks which service the Cranston area.
  - Development of the "blue" areas requires phased water feedermain extensions. These will be staged to accommodate increasing water demands as the Homesteads area grows. Extension of a sanitary sewer trunk and resolution of storm water management issues are also required.

- Other:

  - Development of areas south of Marquis of Lorne Trail will require the possible interchange on Deerfoot Trail at 194 Avenue and upgrading of Marquis of Lorne Trail from Macleod Trail to Deerfoot Trail.
  - Construction of the south extension of Deerfoot Trail from Marquis of Lorne Trail to Highway 2 to begin in 2000.
  - Upgrading of Deerfoot Trail including grade separations at 130 Avenue, McKenzie Lake Boulevard and Douglasdale Boulevard.

■ South Sector

- Chaparral:

  - As the Chaparral area grows, a water feedermain extension will be required on Macleod Trail between 162 Avenue SW and Marquis of Lorne Trail.
  - Short-term growth in Chaparral will require a new intersection on Macleod Trail at 194 Avenue. The intersection is located just beyond City limits and is controlled by the Province. The Province has objected to a traffic signal at this location. Discussions are ongoing.

- Somerset, Bridlewood and Midnapore III:

  - The "green" area will require the construction of a water pump station before development can proceed. Water distribution main extensions or feedermain extensions will also be required initially if development starts south of 162 Avenue SW In addition, the Midnapore sanitary sewer trunk will need to be extended along 162 Avenue SW.
  - Growth in this sector, west of Macleod Trail, will require an additional reservoir cell at the Lower Sarcee reservoir site to reinforce the Lower Sarcee reservoir district.
  - The "blue" area will require extension of the Midnapore sanitary sewer trunk, a new storm sewer outfall to Fish Creek (subject to Provincial approval and resolution of financing). Phased water feedermain extensions and the construction of the water pump station described above is required for the "green" area.

- Full development will require the construction of Sarcee Trail from Anderson Road to 146 or 162 Avenue, the extension of the LRT system south of 146 Avenue, and the expansion of Marquis of Lorne Trail to four lanes.

■ West Sector

- Calgary West:

  - If water efficiency initiatives are not effective in this area or a high density development is approved in the Chapel Grove area, the feedermain crossing the Bow River (described below) and a new reservoir may be required to provide additional capacity to the Valley Ridge pump station.

  - Land in Calgary West which is above the 1,216 m contour will require a water feedermain extension crossing the Bow River and a new reservoir with a pump station. This pump station will be able to provide service to the 1,248 m contour (Broadcast Hill Pressure Zone). Above 1,248 m, the method of water servicing has not been determined. Other water feedermain extensions required for full development of the Tuscany area in the northwest sector must be constructed before the above-noted river crossing is in place.

  - Development in Calgary West may also require improvements to the Valley Ridge Boulevard/TransCanada Highway interchange and widening of the TransCanada Highway to six lanes.

- East Paskapoo Slopes (formally Aspen Village/Winter Heights):

  - Development in the Patterson Heights storm water catchment area will require a new storm sewer trunk and storm outfall to the Bow River, at the developer's expense. Future extensions to the sanitary system will also be constructed at the developer's expense.

  - Development in Aspen Village/Winter Heights may require improvements to the Bowfort Road/TransCanada Highway intersection.

- East Springbank:
  - The entire East Springbank area is serviced with sanitary sewer. Five separate catchment areas for storm drainage exist:
    1. Edworthy Draw – two subareas exist in this catchment area as well as a reduced runoff rate area that will require the construction of a new stormwater management facility and an upgrade to the Edworthy Draw storm trunk. These upgrades are almost complete.
    2. 53 Street Catchment Area – this area is currently serviced with storm sewer.
    3. Springbank Hill (West 69 Street) – Construction of the storm trunk for this area was completed in 1998.
    4. 85 Street Catchment Area – this will require a new storm trunk and storm water management facilities.
    5. 101st St. Catchment Area - This will require a new storm trunk and storm water management facilities.
  - The Broadcast Hill and Strathcona water pressure zones (above 1,169m) can accommodate a total population of 25,000 people. Above 25,000 people, either the capacity of the pump stations supplying the zones with water will have to be upgraded or a feedermain and reservoir will have to be installed. If a reservoir is required, it will be located to the west of the existing city boundary. This would require a water main alignment along Old Banff Coach Road.
  - The Glendale and West Calgary water pressure zones can accommodate development below the elevation of 1,169 m between 69 Street SW and the eastern edge of the major ravine in Sections 3 & 10 – 24 – 2 – W5. Development west of this ravine will require connection to a pre-existing transmission/distribution system in the upper Broadcast Hill/Strathcona zones using pressure reducing valves.

▪ Northwest Sector

- Valley Ridge:

  - If water efficiency initiatives are not effective in this area, or if higher densities are approved in the Chapel Grove area, the feedermain crossing the Bow River and a reservoir, which are needed to service the upper portions of the Calgary West area, may be required to provide additional capacity to the Valley Ridge pump station.

  - Upgrades to the TransCanada Highway/Valley Ridge Boulevard interchange will be required.

- Tuscany, Rocky Ridge and Royal Oak:

  - Full development of the "red" area below the 1,209 m contour will require a water feedermain extension from the Bearspaw Water Treatment Plant to Tuscany. This feedermain must be in place before the feedermain extension across the Bow River for the Calgary West area (in the West sector) is installed.

  - The "green" area in Rocky Ridge/Royal Oak required a new water pump station at the Top Hill Reservoir site an is presently under construction.

  - Growth in this sector, west of Stoney Trail and North of Crowchild Trail, will require an additional reservoir cell at the Top Hill Reservoir site to reinforce the Top Hill Pressure Zone.

  - Upgrades to the 12 Mile Coulee Road south of Crowchild Trail will be needed.

- Symon's Valley (North of the Transportation Utility Corridor)

  - Development of the this area will require an extension of the sanitary sewer across the Transportation and Utility Corridor. Storm sewers will be constructed at the developer's expense.

Appendix I

Tables, Figures and Maps

List of Tables

Table 1: Short-Term Population Projections, 2000 - 2004 .... A-4
Table 2: Forecasted Population and Housing Growth, 2000- 2004 ...... A-4
Table 3: Single Family/Duplex Housing: Household Growth and Vacancy Rates, 1988 - 1999 .... A-5
Table 4: Calgary Housing Starts, 1995 - 1999 .... A-5
Table 5: Market Share Distribution of New Suburban Housing, by Sector, 1995 - 1999 .... A-6
Table 6: Residential Building Permit Applications, 1998 .... A-7
Table 7: Residential Building Permit Applications, 1999 .... A-8
Table 8: Location of Developer Proposals for Residential Subdivision Development in 1999 .... A-9
Table 9: Residential Subdivision Activity, Approved Lots A-9
Table 10: Estimated Supply of Approved Single Family/Duplex Lots in Suburban Areas, by Sector, 1998 and 1999 .... A-10
Table 11: Distribution of Vacant Serviced Lots, by Sector, 1998 & 1999.. A-10
Table 12: Estimated Supply of Unsubdivided Residential Land, by Sector, 1999 .... A-11
Table 13: Short-Term Estimates of Single Family/Duplex Housing Demand and Distribution, By Sector, 2000- 2004..... .... A-12
Table 14: Short-Term Estimates of Residential Land Supply and Demand Conditions, Developing Communities, By Sector, 2000- 2004. A-13

List of Figures

Figure 1: Annual Net Migration for Calgary, Actual and Forecasted A-14
Figure 2: Recent and Forecasted Population Growth for Calgary A-14
Figure 3: Annual Population Growth, Actual and Forecasted A-15
Figure 4: Single Family/Duplex Housing Starts, Actual and Forecasted. A-15
Figure 5: Single Family/Duplex Vacancy Rates A-16
Figure 6: Market Share of New Single Family/Duplex Units,Building Permits, by Sector, 1995 - 1999 .... A-16
Figure 7: Market Share of New Single Family/Duplex Units, Building Permits, by Sector, 1999 .... A-17
Figure 8: Market Share of New Single Family/Duplex Units, Building Permits, by Sector, 1998 .... A-17
Figure 9: Market Share of Single Family/Duplex Units, Building Permits, Developing Communities, by Sector, 1999 .... A-18

List of Figures

.../Continued

Figure 10: Cumulative Single Family/Duplex Housing Starts, 1997, 1998 and 1999 .... A-18

Figure 11: Cumulative Total Housing Starts, 1997, 1998 and 1999 .... A-19

Figure 12: Cumulative Single Family/Duplex Building Permit Applications, 1997, 1998 and 1999 .... A-19

Figure 13: Outline Plan Applications - Number of Acres, 1987 -1999 .... A-20

Figure 14: Tentative Plan Applications - Number of Lots, 1987 - 1999 .... A-20

Figure 15: Distribution of Vacant Single Family/Duplex Lots, by Sector, as of April 1999 .... A-21

Figure 16: Vacant Lot Surveys - ENMAX & U.D.I., 1987 - 1999 .... A-21

Figure 17: Distribution of the Unsubdivided Residential Land Supply, by Sector, April 1999 .... A-22

Figure 18: Distribution of the Unsubdivided Residential Land Supply with Utility Capacity in Place, by Sector, April 1999 .... A-22

Figure 19: Expected Distribution of New Single Family/Duplex Units, By Sector, 2000- 2004 .... A-23

Figure 20: Calgary Housing Starts - Single Family/Duplex vs. Multi-Family, 1971 - 1999 .... A-23

List of Maps

Map 1: Suburban Sectors and Community Districts 1999 .... A-24

Map 2: 1999 Developer Survey A-25

Map 3: New Single Family Building Permits, 1999 .... A-26

Map 4: New Multi Family Building Permits, 1999 .... A-27

Map 5: Congested Signalized Intersections 1996 (most current) A-28

Map 6: Unsubdivided Residential Land Supply, City-Wide (April 1999) A-29

Map 7: Growth In Developing Communities, 1998 - 1999 .... A-31

Map 8: Forecasted Suburban Growth, 2000 - 2004 .... A-32

M121

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Short-Term Population Projections 2000 - 2004 Table 1

Year	Projected Net Migration Medium	Projected Population Medium
1999 (Actual)	15,629	842,388
2000	14,900	864,000
2001	12,100	883,000
2002	11,800	902,000
2003	11,600	920,000
2004	11,100	938,000
Total	77,129	

Source: Corporate Services, 1999 October

Forecasted Population and Housing Growth 2000 - 2004 Table 2
(For Single Family/Duplex and Multi-Family Units)

Year	Population	Single Family/Duplex Units	Multi Family Units	Gross Acres of Residential Land Required		
				@ 7 U.P.A.*	@ 6 U.P.A.*	@ 5 U.P.A.*
1999 Actual	842,388	5,575	2,900	800	930	1,120
2000	864,000	5,750	2,000	820	960	1,150
2001	883,000	6,250	1,700	890	1,040	1,250
2002	902,000	6,250	1,550	890	1,040	1,250
2003	920,000	5,800	1,600	830	970	1,160
2004	938,000	6,300	1,800	900	1,050	1,260
2000-2004	95,600 People added	30,350 Units added	8,650 Units added	4,330 Acres	5,060 Acres	6,070 Acres

* Units Per Acre Gross Residential Density

Source: Civic Census, 1999, April
Corporate Services/Land Use & Mobility, 1999 October
Multi-Family includes Apartment and Townhouse Units

Single Family/Duplex Housing 1988 - 1999 **Table 3**
Household Growth and Vacancy Rates

Year	Population Growth	Growth In Occupied Units	Vacant Units	S. F./Duplex Vacancy Rate
88 - 89	14,020	3,342	2,203	1.43%
89 - 90	21,747	4,788	2,279	1.44%
90 - 91	15,708	4,739	2,411	1.48%
91 - 92	8,540	3,223	2,793	1.68%
92 - 93	10,586	4,603	3,104	1.81%
93 - 94	10,465	4,243	3,104	1.77%
94 - 95	10,889	4,315	3,360	1.86%
95 - 96	17,986	4,358	2,900	1.57%
96 - 97	23,439	5,030	2,621	1.39%
97 - 98	28,629	6,799	2,583	1.32%
98 - 99	23,054	*NA	2,734	1.30%

*Note: Census method changed in 1999 and Occupied Units have been modified from previous method of collection and will not be used this year

Calgary Housing Starts 1995 - 1999 **Table 4**

Year	Single Family	Duplex/ Semi	Row	Apts.	Total	Total S.F./ Duplex	Total Multi-Family	% Multi-Family
1995	3,681	202	524	531	4,938	3,883	1,055	21%
1996	5,031	264	417	515	6,227	5,295	932	15%
1997	7,378	402	873	1,113	9,766	7,780	1,986	20%
1998	7,739	418	714	1,874	10,745	8,157	2,588	24%
1999	5,524	430	508	2,791	9,253	5,954	3,299	36%
Five Year Average	5,957 Units	322 Units	632 Units	1,008 Units	7,919 Units	6,279 Units	1,640 Units	21%

Source: C.M.H.C., 1999 December

Short-Term Population Projections 2000 - 2004 **Table 1**

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Total	77,129	

Source: Corporate Services, 1999 October

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(For Single Family/Duplex and Multi-Family Units)

				Gross Acres of Residential Land Required		
Year	Population	Single Family/Duplex Units	Multi Family Units	@ 7 U.P.A.*	@ 6 U.P.A.*	@ 5 U.P.A.*
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2002	902,000	6,250	1,550	890	1,040	1,250
2003	920,000	5,800	1,600	830	970	1,160
2004	938,000	6,300	1,800	900	1,050	1,260
2000-2004	95,600 People added	30,350 Units added	8,650 Units added	4,330 Acres	5,060 Acres	6,070 Acres

* Units Per Acre Gross Residential Density

Source: Civic Census 1999, April
Corporate Services/Land Use & Mobility, 1999 October
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90 - 91	15,708	4,739	2,411	1.48%
91 - 92	8,540	3,223	2,793	1.68%
92 - 93	10,586	4,603	3,104	1.81%
93 - 94	10,465	4,243	3,104	1.77%
94 - 95	10,889	4,315	3,360	1.86%
95 - 96	17,986	4,358	2,900	1.57%
96 - 97	23,439	5,030	2,621	1.39%
97 - 98	28,629	6,799	2,583	1.32%
98 - 99	23,054	*NA	2,734	1.30%

*Note: Census method changed in 1999 and Occupied Units have been modified from previous method of collection and will not be used this year

Calgary Housing Starts 1995 - 1999 **Table 4**

Year	Single Family	Duplex/ Semi	Row	Apts	Total	Total S.F./ Duplex	Total Multi-Family	% Multi-Family
1995	3,681	202	524	531	4,938	3,883	1,055	21%
1996	5,031	264	417	515	6,227	5,295	932	15%
1997	7,378	402	873	1,113	9,766	7,780	1,986	20%
1998	7,739	418	714	1,874	10,745	8,157	2,588	24%
1999	5,524	430	508	2,791	9,253	5,954	3,299	36%
Five Year Average	5,957 Units	322 Units	632 Units	1,008 Units	7,919 Units	6,279 Units	1,640 Units	21%

Source: C.M.H.C., 1999 December

Market Share Distribution of New Suburban Single Family/Duplex Housing, And Multi-Family Housing By Sector 1995 - 1999

Table 5

Sector	Single Family/Duplex 1995	1996	1997	1998	1999	Average Share 1995 - 1999
North	20%	21%	22%	22%	17%	21%
Northeast	12%	9%	8%	10%	13%	10%
East	4%	4%	4%	4%	1%	3%
Southeast	19%	19%	19%	15%	11%	16%
South	12%	13%	15%	17%	18%	15%
West	9%	7%	6%	7%	10%	8%
Northwest	25%	27%	25%	27%	29%	27%
Suburban Total	100%	100%	100%	100%	100%	100%

Sector	Multi Family 1995	1996	1997	1998	1999	Average Share 1995 - 99
North	2%	5%	18%	5%	16%	9%
Northeast	3%	0%	2%	-1%	7%	2%
East	0%	5%	0%	-1%	13%	3%
Southeast	5%	7%	7%	5%	3%	6%
South	7%	22%	12%	17%	28%	17%
West	69%	41%	28%	40%	13%	38%
Northwest	14%	21%	32%	35%	19%	24%
Suburban Total	100%	100%	100%	100%	100%	100%

* Multi-family includes, apartments and row housing

Source: Land Use & Mobility, Building Permits New Units

Multi Family Building Permit Application Comparisons, By New Units Added

Multi Family Comparisons - By Suburban Sectors						Average Share
New Units Added	**1995**	**1996**	**1997**	**1998**	**1999**	**1995 - 99**
Suburban Sectors	1,452	1,095	1,407	1,884	2,076	**71%**
Central Sector	387	354	237	731	1,457	29%
City Total	1,839	1,449	1,644	2,615	3,533	100%

* Multi-family includes duplexes, apartments and row housing

Multi Family Comparisons - By Developing Communities						Average Share
New Units Added	**1995**	**1996**	**1997**	**1998**	**1999**	**1995 - 99**
Developing Communities	674	848	1,061	1,481	1,326	**49%**
Remainder of City	1,165	601	583	1,134	2,207	51%
City Total	1,839	1,449	1,644	2,615	3,533	100%

* Multi-family includes duplexes, apartments and row housing

Multi Family Comparisons - By Developing Communities						Average Share
New Units Added	**1995**	**1996**	**1997**	**1998**	**1999**	**1995 - 99**
Developing Communities	547	766	906	1,268	1,167	**47%**
Remainder of City	1,110	551	503	1,032	2,067	53%
City Total	1,657	1,317	1,409	2,300	3,234	100%

* Multi-family includes apartments and row housing

Source: Land Use & Mobility, City of Calgary, 2000 January

Information is based upon Building Permit Applications New Units Added

Units Associated with Residential Building Permit Applications **Table 6**
January 1 to December 31, 1998

Suburban Sectors	**Single Family/Duplex Units**				**Multi-Family Units**		**All Units**	
All Communities	Single Family	Duplex	Total	% of Suburbs	Row	Apart.	Total	% of City
North	1,572	45	1,617	**21.7%**	132	304	2,053	**18%**
%	77%	2%	79%		6%	15%	100%	
Northeast	719	4	723	**9.7%**	11	101	835	**7%**
%	86%	0%	87%		1%	12%	100%	
East	264	16	280	**3.8%**	0	34	314	**3%**
%	84%	5%	89%		0%	11%	100%	
Southeast	1,108	2	1,110	**14.9%**	168	69	1,347	**12%**
%	82%	0%	82%		12%	5%	100%	
South	1,181	51	1,232	**16.5%**	112	433	1,777	**16%**
%	66%	3%	69%		6%	24%	100%	
West	453	38	491	**6.6%**	88	178	757	**7%**
%	60%	5%	65%		12%	24%	100%	
Northwest	1,911	85	1,996	**26.8%**	234	439	2,669	**24%**
%	72%	3%	75%		9%	16%	100%	
Suburban Total	7,208	241	7,449	**100%**	745	1,558	9,752	**87%**
%	74%	2%	76%		8%	16%	100%	
Central Sector	174	85	259	-	232	933	1,424	**13%**
%	12%	6%	18%		16%	66%	100%	
City Total	7,382	326	7,708	-	977	2,491	11,176	**100%**
%	66%	3%	69%		9%	22%	100%	

Notes: This Table reflects the number of UNITS applied for and NOT the number of applications, (each multi-family project may have a number of units but only one application).

The Table includes applications for NEW BUILDINGS only, and does not include applications to create units through additions or renovations to existing buildings.

Numbers may not add due to rounding.

Source: Land Use & Mobility, 1999 January

Market Share Distribution of New Suburban Single Family/Duplex Housing. And Multi-Family Housing By Sector 1995 - 1999 **Table 5**

	Single Family/Duplex					Average Share
Sector	**1995**	**1996**	**1997**	**1998**	**1999**	**1996 - 1999**
North	20%	21%	22%	22%	17%	21%
Northeast	12%	9%	8%	10%	13%	10%
East	4%	4%	4%	4%	1%	3%
Southeast	19%	19%	19%	15%	11%	16%
South	12%	13%	15%	17%	18%	15%
West	9%	7%	6%	7%	10%	8%
Northwest	25%	27%	25%	17%	29%	27%
Suburban Total	100%	100%	100%	100%	100%	100%

	Multi Family					Average Share
Sector	**1995**	**1996**	**1997**	**1998**	**1999**	**1995 - 99**
North	2%	5%	18%	5%	16%	9%
Northeast	3%	0%	2%	-1%	7%	2%
East	0%	5%	0%	-1%	13%	3%
Southeast	5%	7%	7%	5%	3%	6%
South	7%	22%	12%	17%	28%	17%
West	69%	41%	28%	40%	13%	38%
Northwest	14%	21%	32%	35%	19%	24%
Suburban Total	100%	100%	100%	100%	100%	100%

* Multi-family includes: apartments and row housing

Source: Land Use & Mobility, Building Permits New Units

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City Total	1,839	1,449	1,644	2,615	3,533	100%

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Remainder of City	1,110	551	503	1,032	2,067	53%
City Total	1,657	1,317	1,409	2,300	3,234	100%

* Multi-family includes apartments and row housing

Source: Land Use & Mobility, City of Calgary, 2000 January
Information is based upon Building Permit Applications New Units Added

Units Associated with Residential Building Permit Applications **Table 6**
January 1 to December 31, 1998

Suburban Sectors *All Communities*	**Single Family/Duplex Units** Single Family	Duplex	Total	% of Suburbs	**Multi-Family Units** Row	Apart	**All Units** Total	% of City
North	1.572	45	1.617	21.7%	132	304	2.053	18%
%	77%	2%	79%		6%	15%	100%	
Northeast	719	4	723	9.7%	11	101	835	7%
%	86%	0%	87%		1%	12%	100%	
East	264	16	280	3.8%	0	34	314	3%
%	84%	5%	89%		0%	11%	100%	
Southeast	1.108	2	1.110	14.9%	168	69	1.347	12%
%	82%	0%	82%		12%	5%	100%	
South	1.181	51	1.232	16.5%	112	433	1.777	16%
%	66%	3%	69%		6%	24%	100%	
West	453	38	491	6.6%	88	178	757	7%
%	60%	5%	65%		12%	24%	100%	
Northwest	1.911	85	1.996	26.8%	234	439	2.669	24%
%	72%	3%	75%		9%	16%	100%	
Suburban Total	7.208	241	7.449	100%	745	1.558	9.752	87%
%	74%	2%	76%		8%	16%	100%	
Central Sector	174	85	259	-	232	933	1.424	13%
%	12%	6%	18%		16%	66%	100%	
City Total	7.382	326	7.708	-	977	2.491	11.176	100%
%	66%	3%	69%		9%	22%	100%	

Notes: This Table reflects the number of UNITS applied for and NOT the number of applications. (each multi-family project may have a number of units but only one application)

The Table includes applications for NEW BUILDINGS only, and does not include applications to create units througt additions or renovations to existing buildings.

Numbers may not add due to rounding.

Source: Land Use & Mobility, 1999 January

Units Associated with Residential Building Permit Applications **Table 7**
January 1 to December 31. 1999

	Single Family/Duplex Units				Multi-Family Units		All Units	
Suburban Sectors ***All Communities***	Single Family	Duplex	Total	% of Suburbs	Row	Apart	Total	% of City
North	962	20	982	17.2%	159	140	1.281	14%
%	75%	2%	77%		12%	11%	100%	
Northeast	730	0	730	12.8%	71	65	866	9%
%	84%	0%	84%		8%	8%	100%	
East	76	8	84	1.5%	16	230	330	4%
%	23%	2%	25%		5%	70%	100%	
Southeast	631	1	632	11.1%	57	0	689	7%
%	92%	0%	92%		8%	0%	100%	
South	999	48	1.047	18.4%	126	405	1.578	17%
%	63%	3%	66%		8%	26%	100%	
West	520	64	584	10.3%	141	105	830	9%
%	63%	8%	70%		17%	13%	100%	
Northwest	1.575	63	1.638	28.8%	31	325	1.994	22%
%	79%	3%	82%		2%	16%	100%	
Suburban Total	5.493	204	5.697	100%	601	1.271	7.569	82%
%	73%	3%	75%		8%	17%	100%	
Central Sector	162	95	257	-	345	1017	1.619	18%
%	10%	6%	16%		21%	63%	100%	
City Total	5.655	299	5.954	-	946	2.288	9.188	100%
%	62%	3%	65%		10%	25%	100%	

Notes: This Table reflects the number of UNITS applied for and NOT the number of applications. (each multi-family project may have a number of units but only one application).

The Table includes applications for NEW BUILDINGS only, and does not include applications to create units through additions or renovations to existing buildings.

Numbers may not add due to rounding.

Source: Land Use & Mobility. 2000 January

Location of Developer Proposals For Residential Subdivision Development in 1999 **Table 8**

Sector	Hectares	Acres	%	Communities Affected
North	142	351	15%	Cinnamon Hills, Country Hills, Country Hills Village, Coventry Hills, Harvest Hills, Hidden Valley, Panorama Hills, Simon's Valley Ph. 1
Northeast	103	255	11%	Coral Springs, Martindale, Monterey Park, Saddle Ridge, Taradale
East	2	4	0%	Dover
Southeast	63	156	7%	Cranston, Douglas Glen, McKenzie Towne
South	163	403	18%	Bridlewood, Canyon Meadows, Chaparral, Evergreen Estates, Lake Bonavista, Midnapore 3 Community Plan, Millrise, Shawnessy, Somerset
West	185	457	20%	Calgary West ASP, CFB - Currie, Crestview, Discovery Ridge, East Springbank, Patterson, Signal Hill, Springbank Hill, Strathcona
Northwest	265	654	29%	Arbour Lake, Citadel, Edgemont, Hamptons, Rocky Ridge, Royal Oak, Tuscany, Valley Ridge
Total	923	2,281	100%	

Source: Utilities & Environmental Protection, 1999 March
Developer Survey - Proposed Subdivision Development in 1999

Residential Subdivision Activity, (Tentative Plan Approvals Number of Lots) 1997, 1998 & 1999 **Table 9**

Tentative Plan Approvals Number of Lots	**1996**	**1997**	**1998**	**1999**	**Total**
Single Family	4,811	8,381	7,745	6,088	**27,025**
Two Family	128	98	222	214	**662**
Other Multi Family	29	120	75	114	**338**
Bareland Condominium	682	351	541	668	**2,242**
Total	**5,650**	**8,950**	**8,583**	**7,084**	**30,267**

Source: Land Use & Mobility, December 1999

Units Associated with Residential Building Permit Applications **Table 7**
January 1 to December 31, 1999

Suburban Sectors	Single Family/Duplex Units				Multi-Family Units		All Units	
All Communities	Single Family	Duplex	Total	% of Suburbs	Row	Apart.	Total	% of City
North	962	20	982	**17.2%**	159	140	1,281	**14%**
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Northeast	730	0	730	**12.8%**	71	65	866	**9%**
%	84%	0%	84%		8%	8%	100%	
East	76	8	84	**1.5%**	16	230	330	**4%**
%	23%	2%	25%		5%	70%	100%	
Southeast	631	1	632	**11.1%**	57	0	689	**7%**
%	92%	0%	92%		8%	0%	100%	
South	999	48	1,047	**18.4%**	126	405	1,578	**17%**
%	63%	3%	66%		8%	26%	100%	
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%	63%	8%	70%		17%	13%	100%	
Northwest	1,575	63	1,638	**28.8%**	31	325	1,994	**22%**
%	79%	3%	82%		2%	16%	100%	
Suburban Total	5,493	204	5,697	**100%**	601	1,271	7,569	**82%**
%	73%	3%	75%		8%	17%	100%	
Central Sector	162	95	257	-	345	1017	1,619	**18%**
%	10%	6%	16%		21%	63%	100%	
City Total	5,655	299	5,954	-	946	2,288	9,188	**100%**
%	62%	3%	65%		10%	25%	100%	

Notes: This Table reflects the number of UNITS applied for and NOT the number of applications, (each multi-family project may have a number of units but only one application).

The Table includes applications for NEW BUILDINGS only, and does not include applications to create units through additions or renovations to existing buildings.

Numbers may not add due to rounding.

Source: Land Use & Mobility, 2000 January

Location of Developer Proposals For Residential Subdivision Development in 1999 **Table 8**

Sector	Hectares	Acres	%	Communities Affected
North	142	351	15%	Cinnamon Hills, Country Hills, Country Hills Village, Coventry Hills, Harvest Hills, Hidden Valley, Panorama Hills, Simon's Valley Ph. 1
Northeast	103	255	11%	Coral Springs, Martindale, Monterey Park, Saddle Ridge, Taradale
East	2	4	0%	Dover
Southeast	63	156	7%	Cranston, Douglas Glen, McKenzie Towne
South	163	403	18%	Bridlewood, Canyon Meadows, Chaparral, Evergreen Estates, Lake Bonavista, Midnapore 3 Community Plan, Millrise, Shawnessy, Somerset
West	185	457	20%	Calgary West ASP, CFB - Currie, Crestview, Discovery Ridge, East Springbank, Patterson, Signal Hill, Springbank Hill, Strathcona
Northwest	265	654	29%	Arbour Lake, Citadel, Edgemont, Hamptons, Rocky Ridge, Royal Oak, Tuscany, Valley Ridge
Total	923	2,281	100%	

Source: Utilities & Environmental Protection, 1999 March
Developer Survey - Proposed Subdivision Development in 1999

Residential Subdivision Activity, (Tentative Plan Approvals Number of Lots) 1997, 1998 & 1999 **Table 9**

Tentative Plan Approvals Number of Lots	1996	1997	1998	1999	Total
Single Family	4,811	8,381	7,745	6,088	**27,025**
Two Family	128	98	222	214	**662**
Other Multi Family	29	120	75	114	**338**
Bareland Condominium	682	351	541	668	**2,242**
Total	**5,650**	**8,950**	**8,583**	**7,084**	**30,267**

Source: Land Use & Mobility, December 1999

Estimated Supply of Approved Single Family/Duplex Lots in Suburban Areas By Sector, 1998 & 1999 **Table 10**

	Single Family/Duplex Lots					
	1998 (April)			1999 (April)		
Sector	Lots Under Construction	Vacant Lots	% of Total Vacant Lots	Lots Under Construction	Vacant Lots	% of Total Vacant Lots
North	577	1,968	18%	315	1,588	15%
Northeast	201	1,188	11%	164	1,223	12%
East	107	211	2%	24	43	0%
Southeast	470	1,316	12%	184	912	9%
South	412	1,697	16%	302	1,769	17%
West	209	770	5%	135	1,410	13%
Northwest	772	3,615	34%	516	3,661	34%
Total	2,748	10,765	100%	1,640	10,606	100%

Estimates include registered lots and lots in approved Tentative Plans

Source: Land Use & Mobility, 1999 December

Distribution of Vacant Serviced Lots, By Sector 1998 & 1999 **Table 11**

	1998		1999	
Sector	Vacant Lots	%	Vacant Lots	%
North	1,181	15%	871	11%
Northeast	737	10%	945	12%
East	241	3%	0	0%
Southeast	1,401	18%	809	10%
South	1,141	15%	1,394	17%
West	725	9%	1,354	17%
Northwest	2,315	30%	2,788	34%
Total Suburbs	7,741	100%	8,161	100%

Source: Urban Development Institute (U.D.I.) Survey,
1998 January & 1999 January

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Total Suburbs	7,741	100%	8,161	100%

Source: Urban Development Institute (U.D.I.) Survey,
1998 January & 1999 January

Estimated Supply of Unsubdivided Residential Land By Sector, As of April, 1999 (In Gross Acres) **Table 12**

Sector	Utility Capacity In Place	Some Utility Capacity In Place	No Utility Capacity In Place	Total Supply
North	315	558	624	1,497
Northeast	1,351	0	0	1,351
East	0	0	0	0
Southeast	826	937	3,695	5,458
South	1,063	279	404	1,746
West	872	2,789	0	3,661
Northwest	1,733	267	0	2,000
Total	6,160 Acres	4,830 Acres	4,723 Acres	15,713 Acres

Notes: This inventory includes sites identified for multi-family uses in existing Outline Plans (371 acres). The inventory excludes areas of land annexed in 1989 for which land use policy and/or servicing information is not yet available.

Source: Land Use & Mobility, 1999 December

Short-Term Estimates of Single Family/Duplex Housing Demand and Distribution By Sector, For The Developing Communities and the City of Calgary 2000 - 2004

Table 13

	Developing Communities Forecast										2000 - 2004		
	2000		2001		2002		2003		2004		Average	Total	Total
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
North	19%	1,030	20%	1,180	20%	1,180	20%	1,090	20%	1,180	20%	5,660	940
Northeast	13%	700	12%	710	12%	710	12%	650	12%	710	12%	3,480	580
East	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0
Southeast	14%	760	15%	880	17%	1,000	18%	980	19%	1,130	17%	4,750	790
South	17%	920	16%	940	15%	880	15%	820	15%	890	16%	4,450	740
West	10%	540	10%	590	10%	590	10%	550	10%	590	10%	2,860	480
Northwest	27%	1,460	27%	1,590	26%	1,530	25%	1,360	24%	1,420	26%	7,360	1,230
Total	100%	5,405	100%	5,875	100%	5,875	100%	5,452	100%	5,922	100%	28,529	4,760

	City Total Forecast					2000 - 2004	
	2000	2001	2002	2003	2004	Total	Total
	Units	Units	Units	Units	Units	Units	Acres
City Total	5,750	6,250	6,250	5,800	6,300	30,350	5,060

Notes: total acres based on 6 upa.

Numbers may not add due to rounding.

Historical share of growth for the last 5 year period was 94% for the developing communities and is used to forecast the next 5 years

This forecast table has changed from previous years methods of estimating market shares. This now reflects developing communities instead of the whole Sector as in previous years. Hence the change from previous traditional market shares.

SOURCE: Land Use & Mobility, 1999 December

Short-Term Estimates of Residential Land Supply and Demand Conditions For Single Family/Duplex Uses (By Developing Communities). 2000 - 2004 **Table 14**

Sector	2000	2001	2002	2003	2004	Total Demand 2000-2004	Supply With Utility Capacity (*)	Surplus or Shortfall By 2004(*)
North	172	197	197	182	197	940	266	-674
Northeast	117	118	118	108	118	580	1.319	739
East	0	0	0	0	0	0	0	NA
Southeast	127	147	167	163	188	790	797	7
South	153	157	147	137	148	740	1.019	279
West	90	98	98	92	98	480	815	335
Northwest	243	265	255	227	237	1.230	1.573	343
Total	**900** Acres	**980** Acres	**980** Acres	**910** Acres	**990** Acres	**4,760** Acres	**5,789** Acres	**1,029** Acres

Notes: * Unsubdivided land only.

Excludes supply available in existing vacant subdivided lots (refer to Table 10).

10.606 Vacant Single Family/Duplex Units.

1,768 Acres

Also excludes land designated for multi-family uses (371 acres). which was included in Table 12.

Numbers may not total due to rounding.

SOURCE: Land Use & Mobility, 1999 December

Short-Term Estimates of Single Family/Duplex Housing Demand and Distribution

Table 13

By Sector, For The Developing Communities and the City of Calgary 2000 - 2004

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Northeast	13%	700	12%	710	12%	710	12%	650	12%	710	12%	3,480	580
East	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0
Southeast	14%	760	15%	880	17%	1,000	18%	980	19%	1,130	17%	4,750	790
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	City Total Forecast					2000 - 2004	
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Notes: total acres based on 6 upa

Numbers may not add due to rounding.

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SOURCE: Land Use & Mobility, 1999 December

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Notes: * Unsubdivided land only

Excludes supply available in existing vacant subdivided lots (refer to Table 10).

10.606 Vacant Single Family/Duplex Units.

1.768 Acres

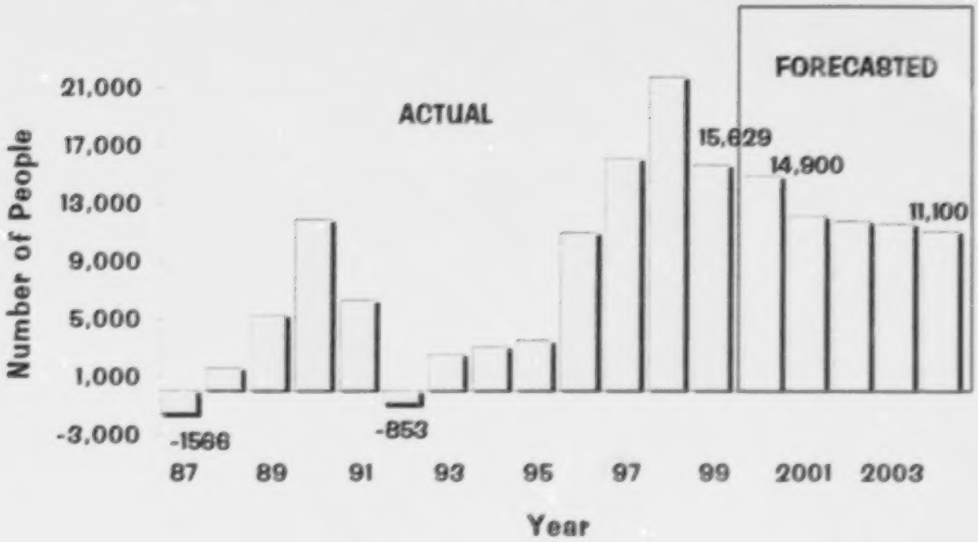
Also excludes land designated for multi-family uses (371 acres), which was included in Table 12

Numbers may not total due to rounding

SOURCE: Land Use & Mobility, 1999 December

Figure 1

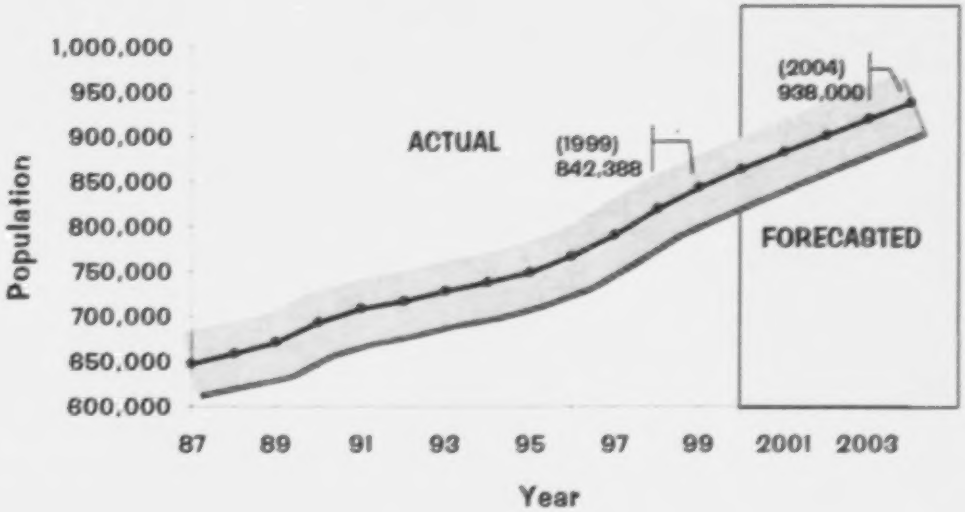
ANNUAL NET MIGRATION FOR CALGARY ACTUAL (1987 - 99) AND FORECASTED (2000 - 2004)



REFER TO TABLE 1

Figure 2

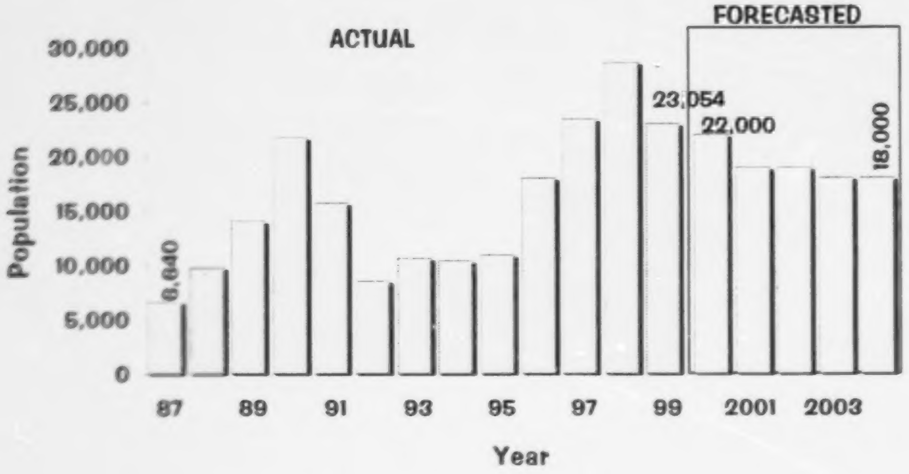
RECENT AND FORECASTED POPULATION GROWTH FOR CALGARY, 1987 - 2004



REFER TO TABLE 1

Figure 3

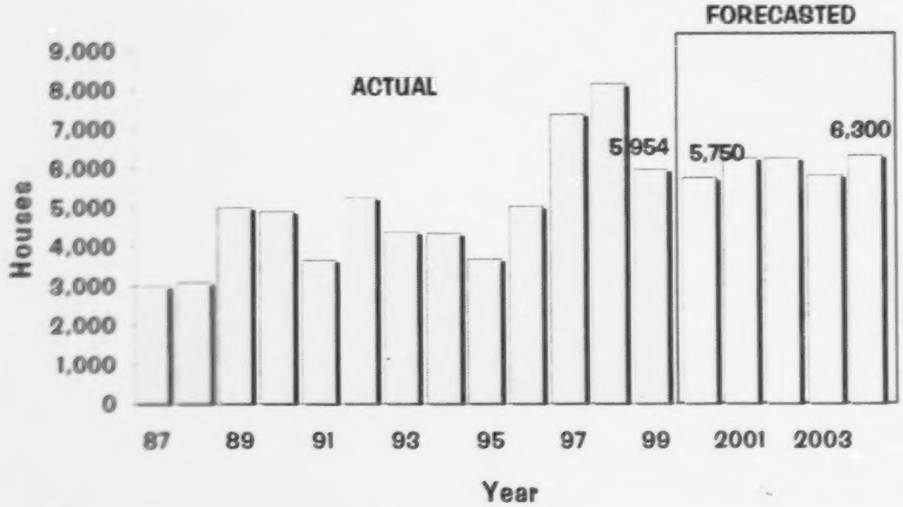
ANNUAL POPULATION GROWTH
ACTUAL (1987 - 98) AND FORECASTED (2000 - 2004)



REFER TO TABLE 2 AND TABLE 3

Figure 4

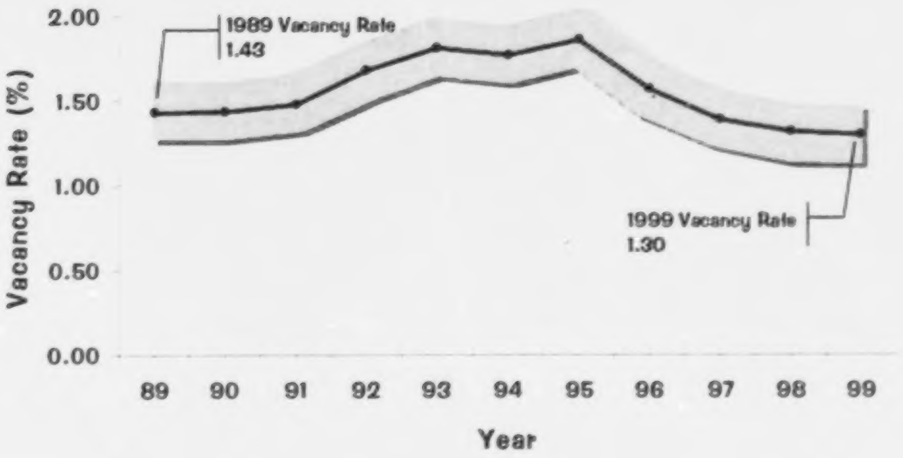
SINGLE FAMILY/DUPLEX HOUSING STARTS,
ACTUAL (1987 - 99) AND FORECASTED (2000 - 2004)



REFER TO TABLE 2 AND TABLE 4

Figure 5

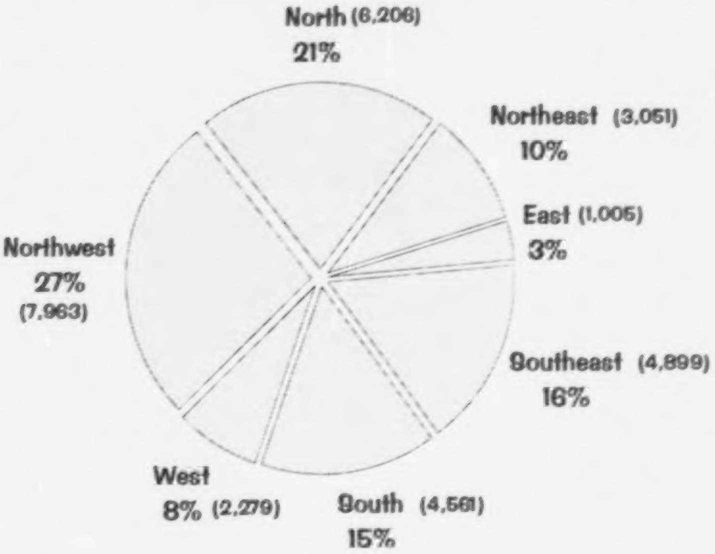
SINGLE FAMILY/DUPLEX VACANCY RATES 1987 - 1999 (APRIL)



REFER TO TABLE 3

Figure 6

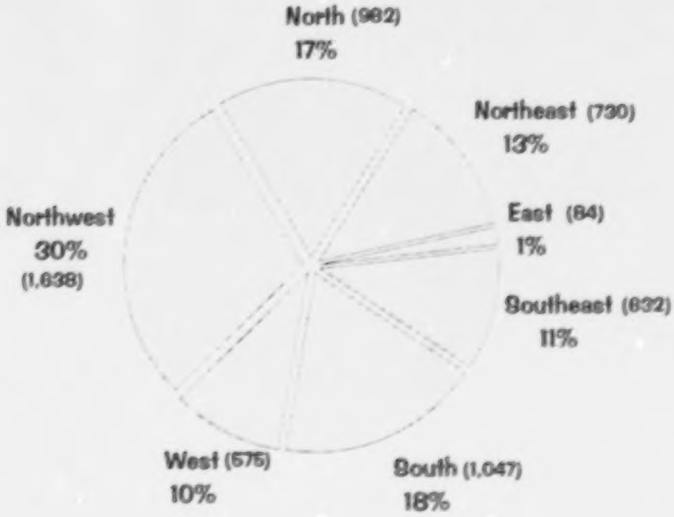
MARKET SHARE OF NEW SINGLE FAMILY/DUPLEX UNITS (Building Permit Applications) BY SECTOR, 1995 - 1999



REFER TO TABLE 5

Figure 7

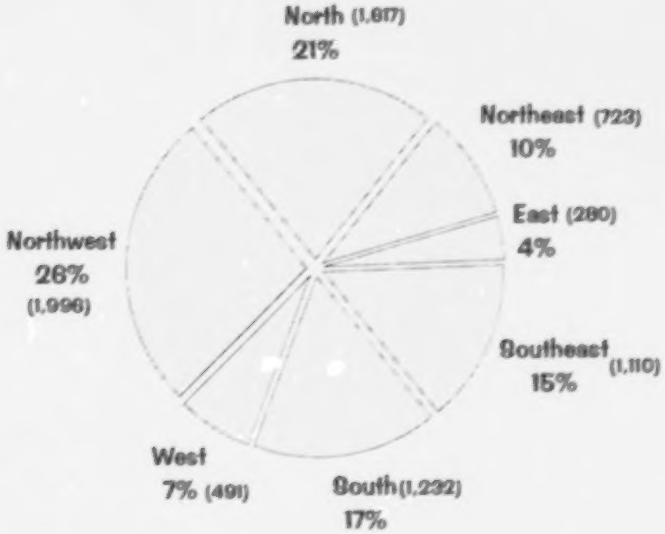
MARKET SHARE OF NEW SINGLE FAMILY/DUPLEX UNITS (Building Permit Applications) BY SECTOR, 1999



REFER TO TABLE 5

Figure 8

MARKET SHARE OF NEW SINGLE FAMILY/DUPLEX UNITS (Building Permit Applications) BY SECTOR, 1998



REFER TO TABLE 6

Figure 9

MARKET SHARE OF NEW SINGLE FAMILY/DUPLEX UNITS (Building Permit Applications) BY DEVELOPING COMMUNITIES, 1999

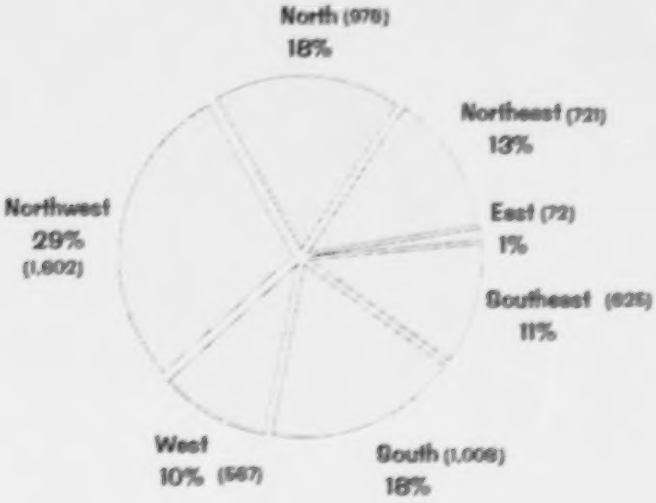


Figure 10

CUMULATIVE SINGLE FAMILY/DUPLEX HOUSING STARTS, BY MONTH, 1997, 1998, AND 1999

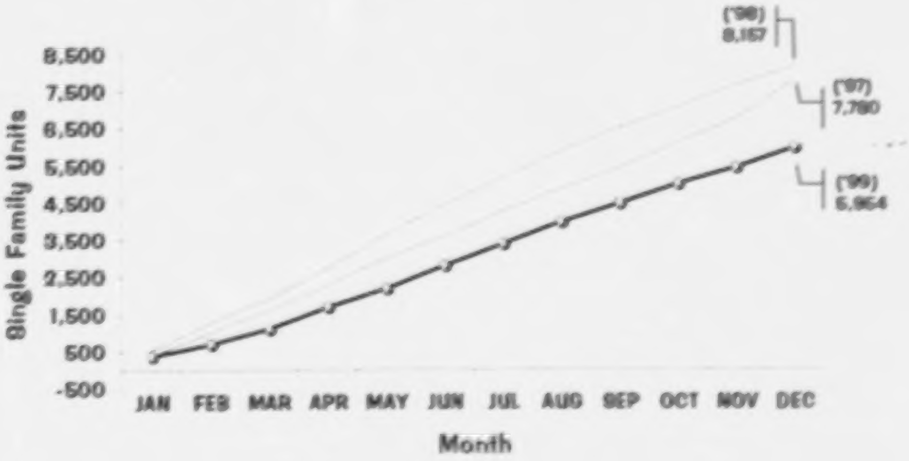


Figure 11

CUMULATIVE TOTAL HOUSING STARTS, BY MONTH, 1997, 1998 AND 1999

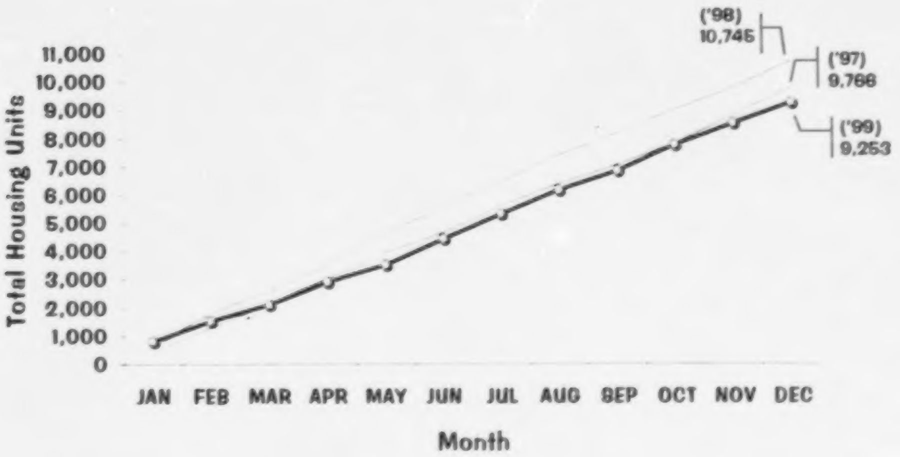
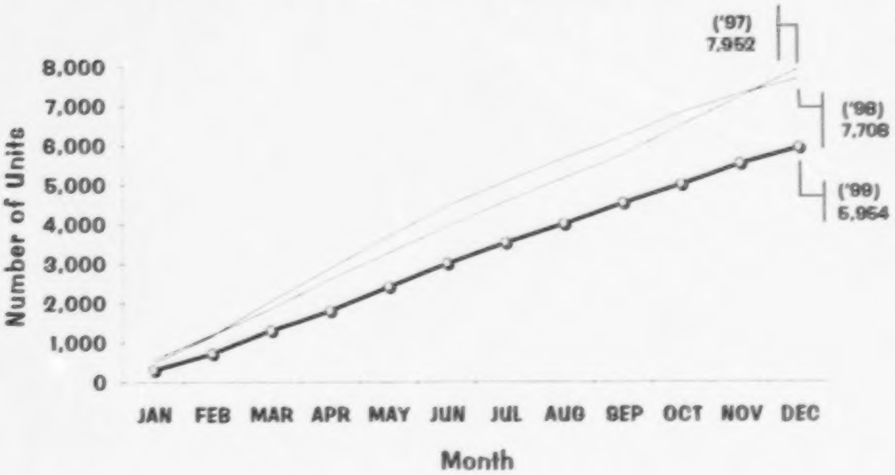


Figure 12

CUMULATIVE SINGLE FAMILY/DUPLEX BUILDING PERMIT APPLICATIONS, BY MONTH, 1997, 1998 AND 1999



REFER TO TABLE 7

Figure 13

OUTLINE PLAN APPLICATIONS (NUMBER OF ACRES) 1987 - 1999

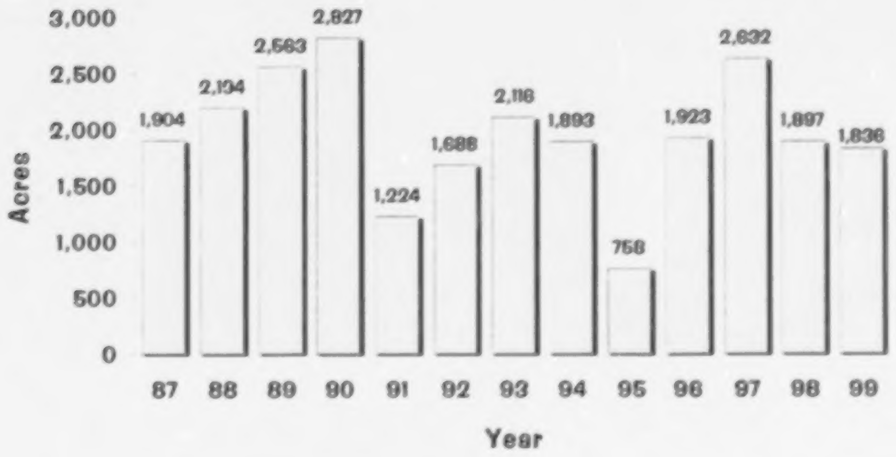


Figure 14

TENTATIVE PLAN APPLICATIONS (NUMBER OF LOTS) 1987 - 1999

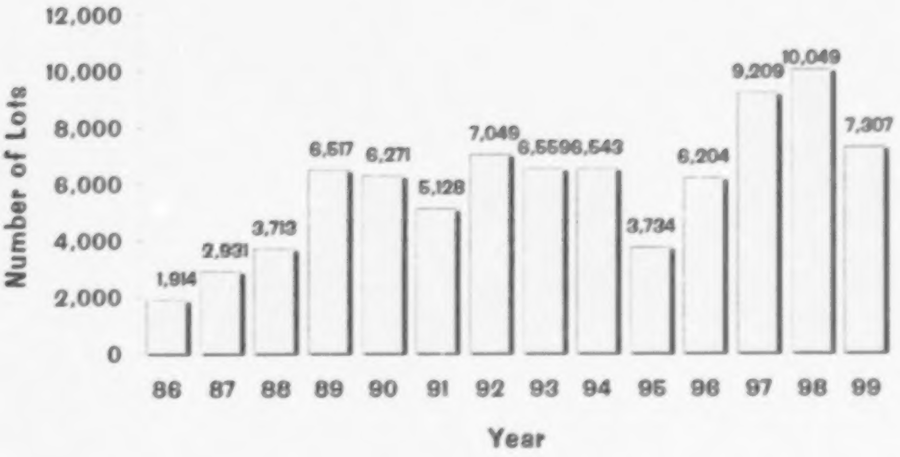
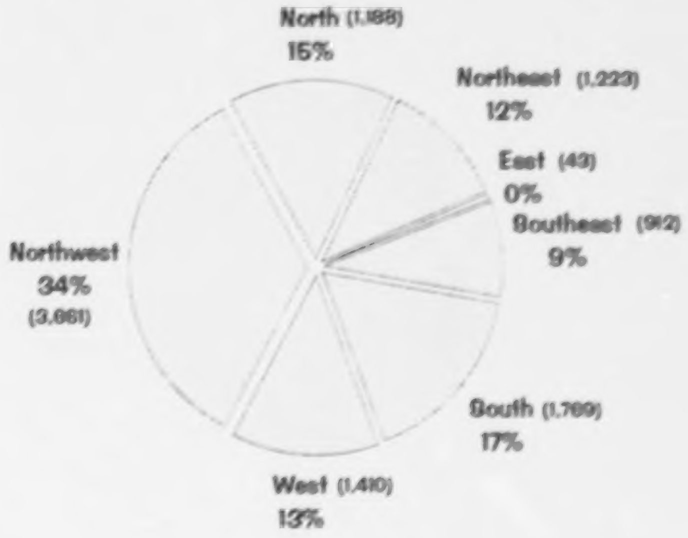


Figure 15

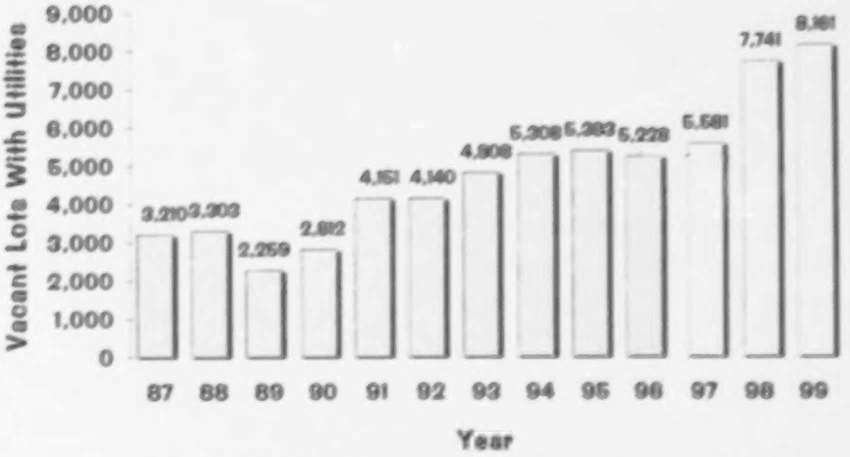
DISTRIBUTION OF VACANT SINGLE FAMILY/DUPLEX LOTS (Estimated) BY SECTOR, APRIL, 1999



REFER TO TABLE 10

Figure 16

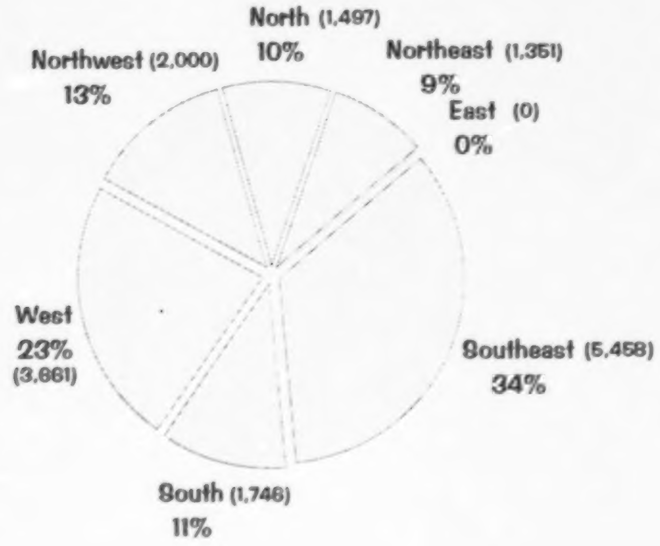
VACANT LOT SURVEYS - ENMAX & URBAN DEVELOPMENT INSTITUTE, 1987 - 1999



Source: ☐ 1986 - 1996 City of Calgary Electric System Survey (Shallow Utilities in Place)
☐ 1997 - Present U.D.I. (May or May Not Have Shallow Utilities in Place)

Figure 17

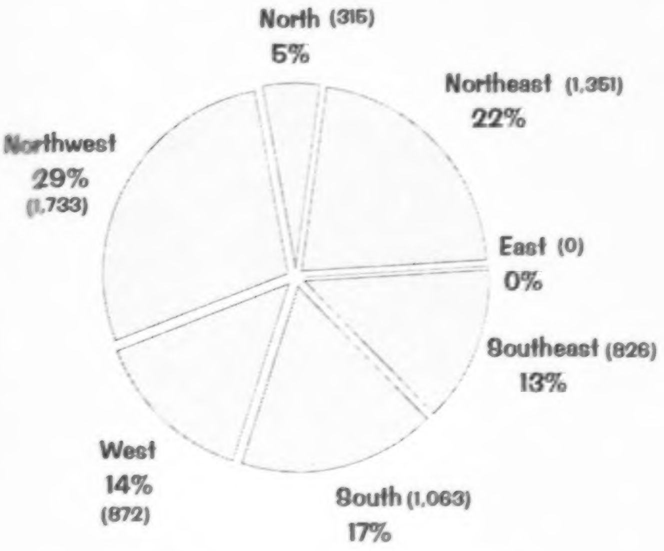
DISTRIBUTION OF THE UNSUBDIVIDED RESIDENTIAL LAND SUPPLY, BY SECTOR (APRIL 1999) (ACRES)



REFER TO TABLE 12

Figure 18

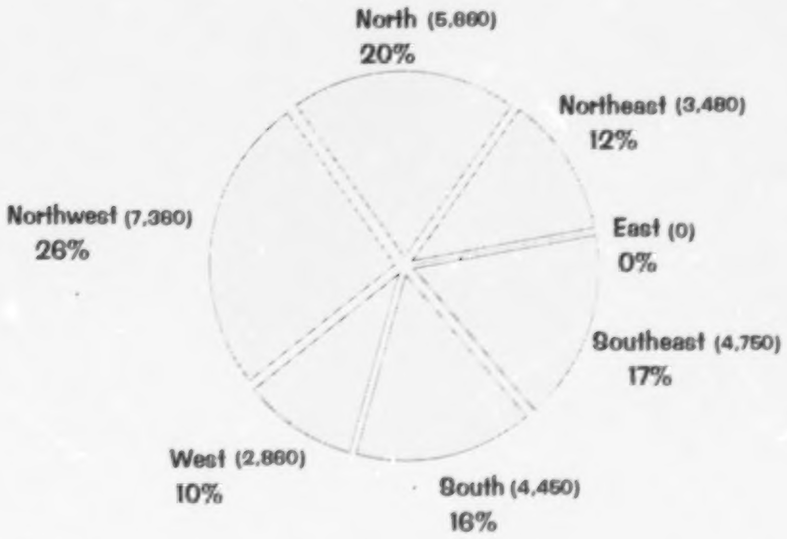
DISTRIBUTION OF THE UNSUBDIVIDED RESIDENTIAL LAND SUPPLY WITH UTILITY CAPACITY IN PLACE, BY SECTOR (APRIL 1999) (ACRES)



REFER TO TABLE 12

Figure 19

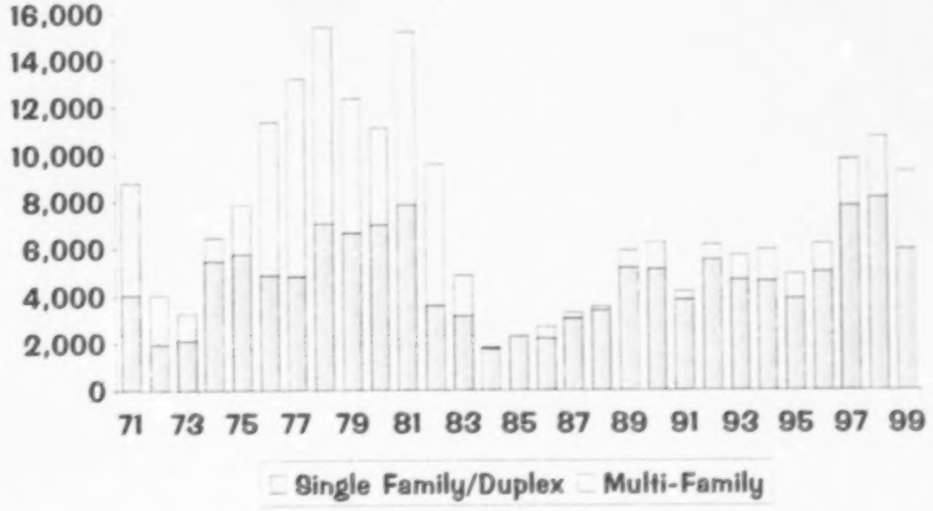
EXPECTED DISTRIBUTION OF NEW SINGLE FAMILY/DUPLEX UNITS, BY SECTOR (Developing Communities), (2000 - 2004)

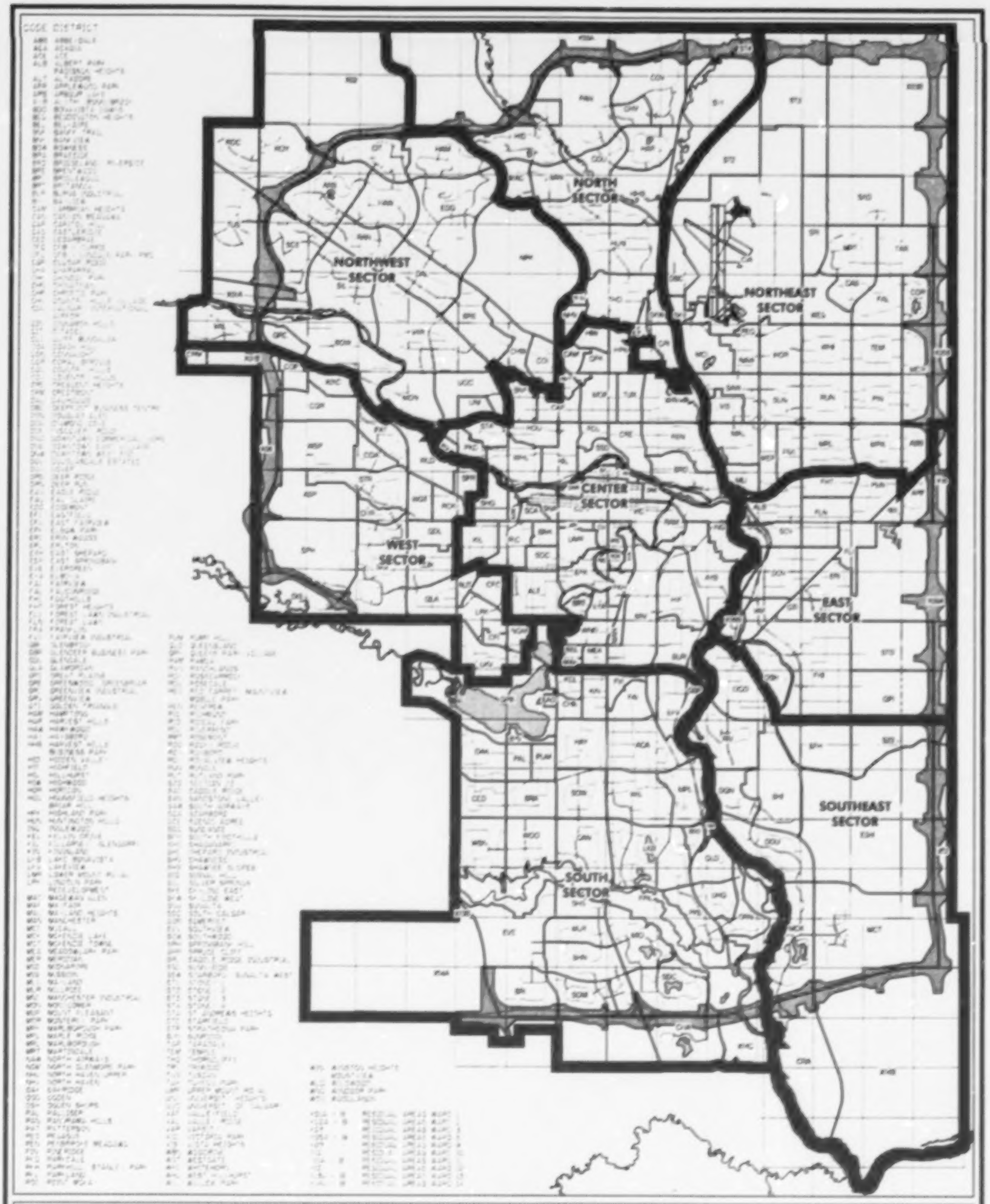


REFER TO TABLE 13

Figure 20

CALGARY HOUSING STARTS
SINGLE FAMILY/DUPLEX VS MULTI-FAMILY, (1971 - 1999)




CODE DISTRICT
NORTH SECTOR
NORTHWEST SECTOR
NORTHEAST SECTOR
CENTER SECTOR
WEST SECTOR
EAST SECTOR
SOUTHEAST SECTOR
SOUTH SECTOR

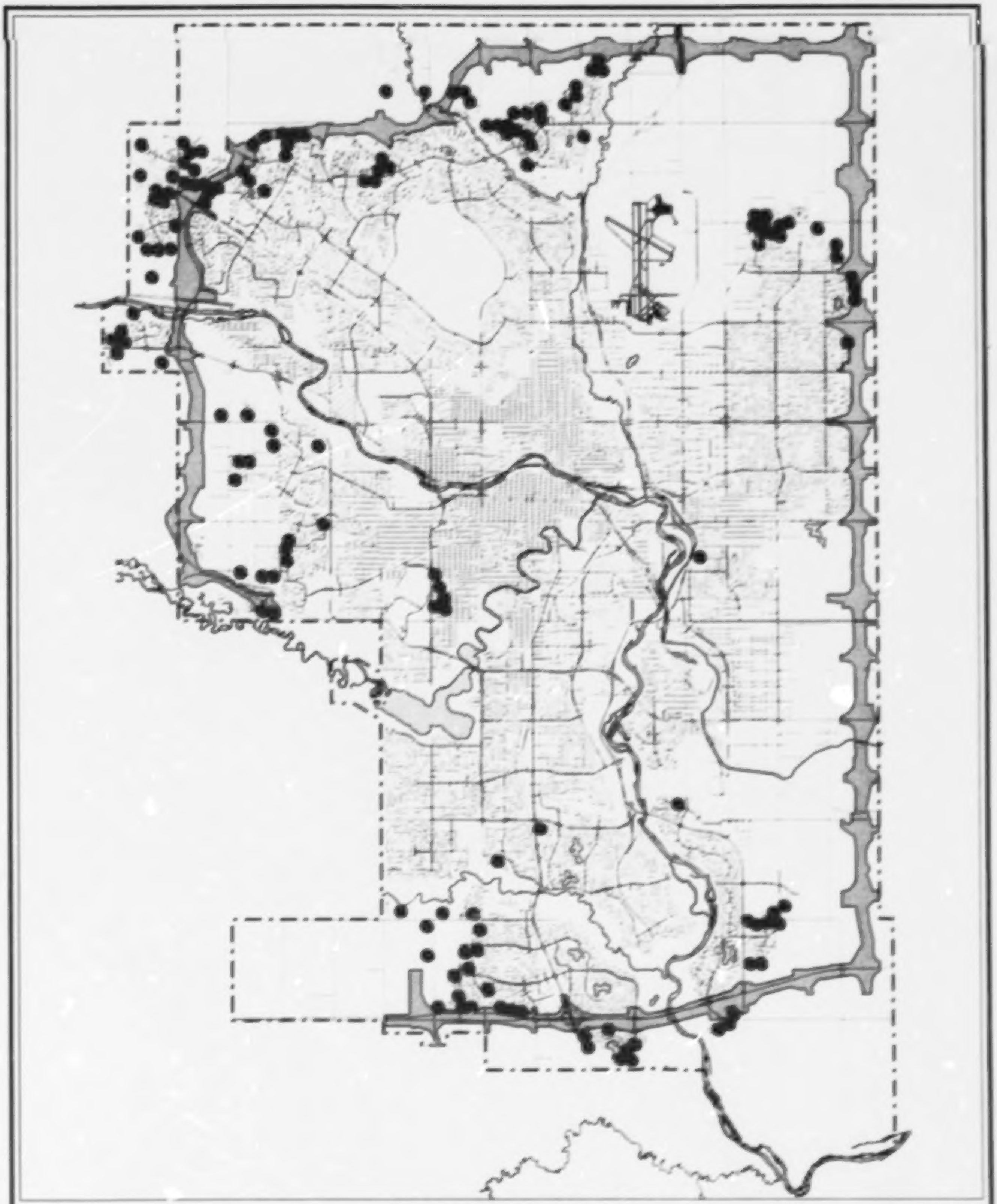
SUBURBAN SECTORS AND COMMUNITY DISTRICTS OF CALGARY - 1999

THE CITY OF CALGARY
LAND USE AND MOBILITY
PLANNING POLICY
CALGARY - The Best Place To Live!

SHORT-TERM GROWTH
MANAGEMENT STRATEGY

CITY-WIDE
MAP 1

c:\plan\growth\report\wf_rpt.dgn



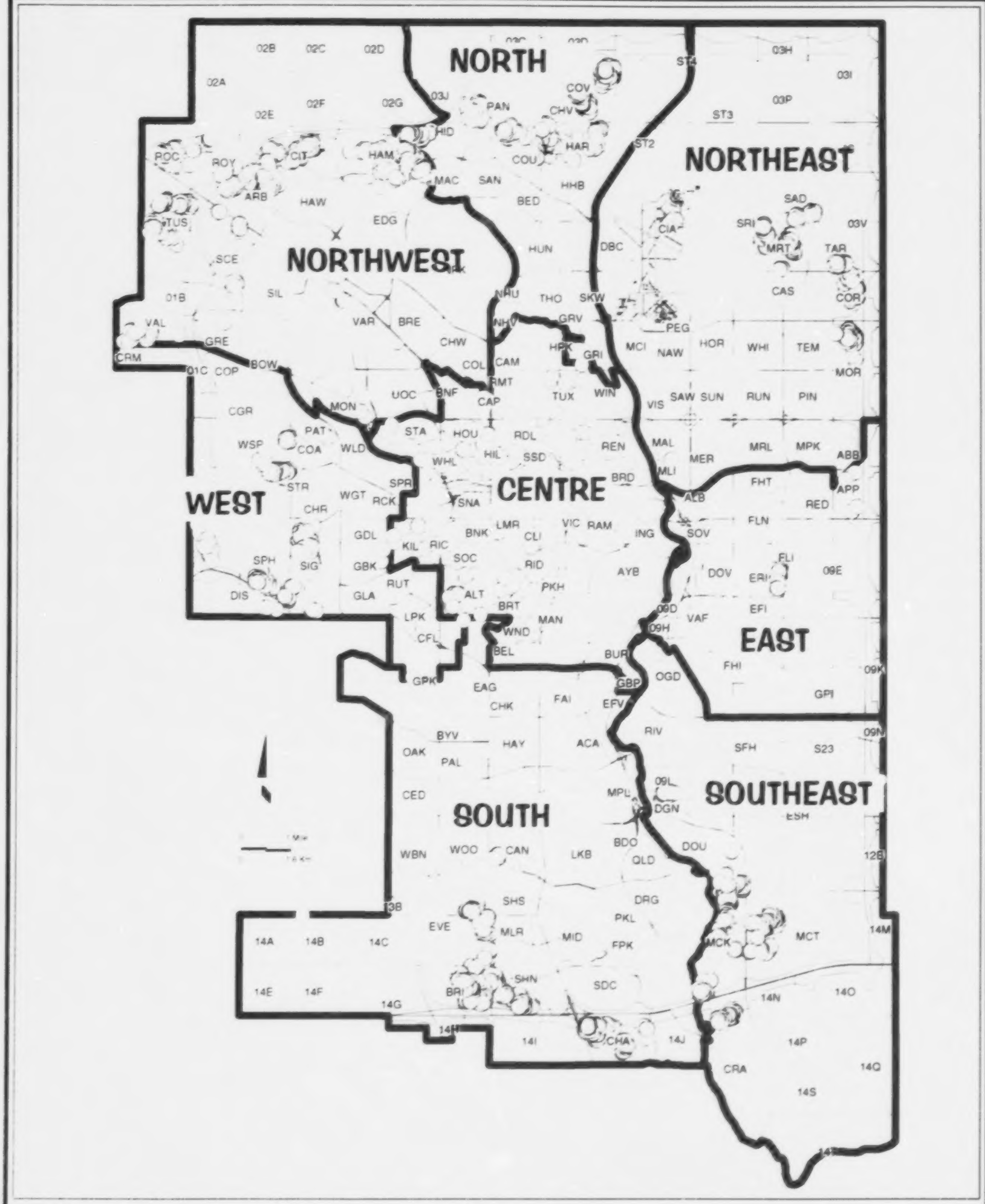
1999 DEVELOPER SURVEY

AREAS IN WHICH DEVELOPERS HAVE INDICATED
ANTICIPATED DEVELOPMENT ACTIVITY

THE CITY OF CALGARY
LAND USE AND MOBILITY
PLANNING POLICY
CALGARY - The Best Place To Live!

SHORT-TERM GROWTH
MANAGEMENT STRATEGY

CITY-WIDE
MAP 2


NORTH
NORTHEAST
NORTHWEST
WEST
CENTRE
EAST
SOUTHEAST
SOUTH
02A
02B
02C
02D
02E
02F
02G
03J
03H
03I
03P
03V
ST4
ST3
ST2
COV
PAN
CHV
HID
HAR
COU
HAM
CIT
ROC
ROY
ARB
TUS
HAW
EDG
MAC
SAN
BED
HHB
SAD
SRI
CIA
MRT
TAR
HUN
DBC
SCE
CAS
COR
01B
SIL
NHU
THO
SKW
VAL
VAR
BRE
NHV
GRV
PEG
GRE
CHW
HPK
GRI
MCI
NAW
HOR
WHI
TEM
CRM
01C
COP
BOW
COL
CAM
MOR
RMT
CGR
MON
UOC
BNF
CAP
TUX
WIN
VIS
SAW
SUN
RUN
PIN
PAT
STA
HOU
RDL
WSP
COA
WLD
REN
MAL
MRL
MPK
ABB
WHL
HIL
SSD
MER
STR
SPR
BRD
MLI
FHT
APP
WGT
RCK
SNA
ALB
RED
CHR
LMR
VIC
RAM
ING
SOV
FLN
GDL
BNK
CLI
KIL
RIC
SPH
SIG
GBK
SOC
RID
AYB
FLI
DOV
ERI
09E
RUT
DIS
GLA
ALT
PKH
EFI
BRT
09D
LPK
VAF
09H
WND
MAN
CFL
BEL
BUR
FHI
09K
GPK
GBP
OGD
EAG
CHK
FAI
EFV
GPI
RIV
09N
BYV
SFH
S23
OAK
HAY
ACA
PAL
09L
CED
MPL
DGN
ESH
WBN
WOO
CAN
LKB
BDO
DOU
QLD
12B
13B
SHS
DRG
EVE
PKL
14A
14B
14C
MLR
MID
FPK
MCK
MCT
14M
SHN
14E
14F
BRI
SDC
14N
14O
14G
14H
14I
CHA
14J
14P
CRA
14Q
14S

BUILDING PERMIT APPLICATIONS FOR NEW SINGLE FAMILY HOUSES - 1999

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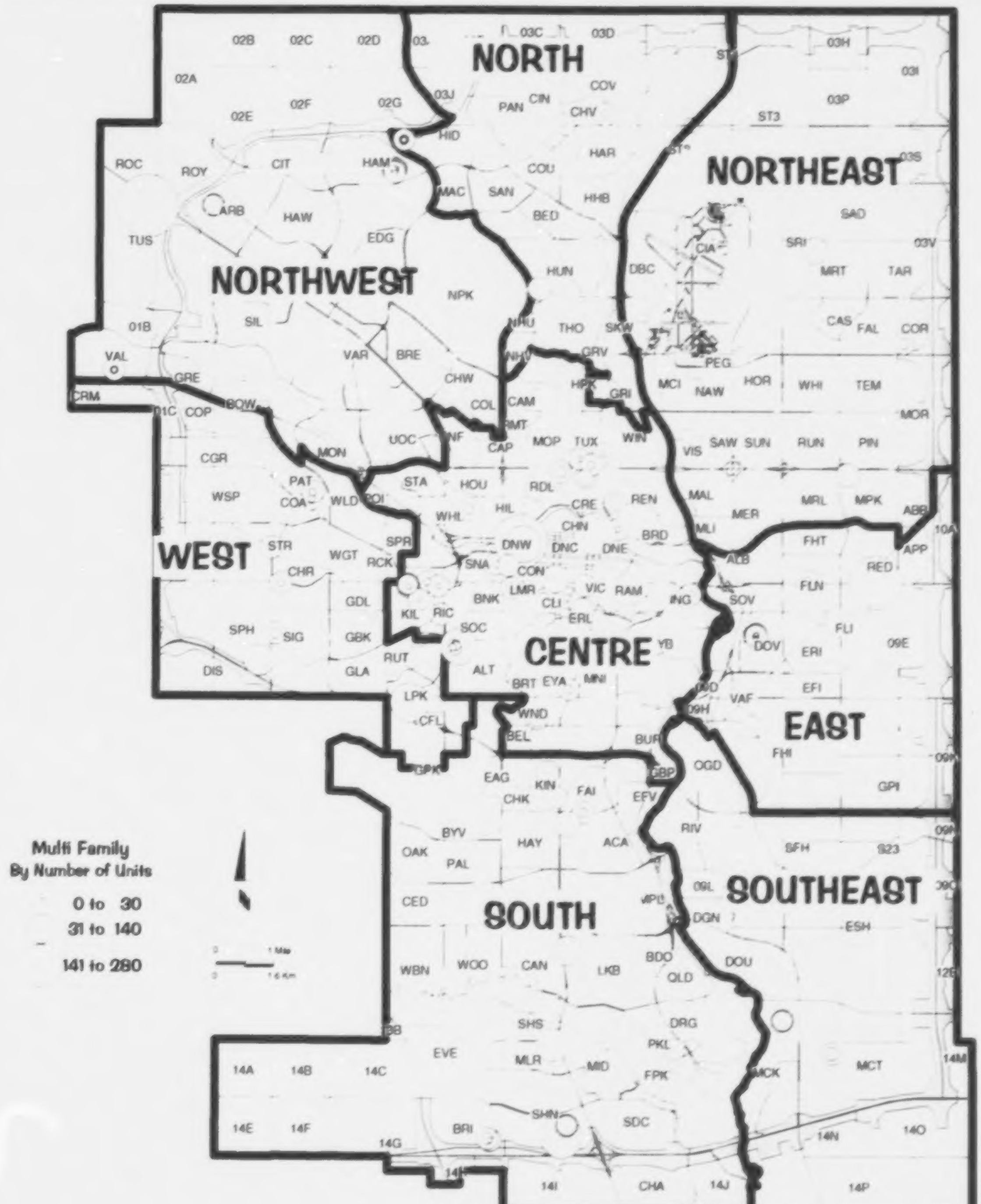
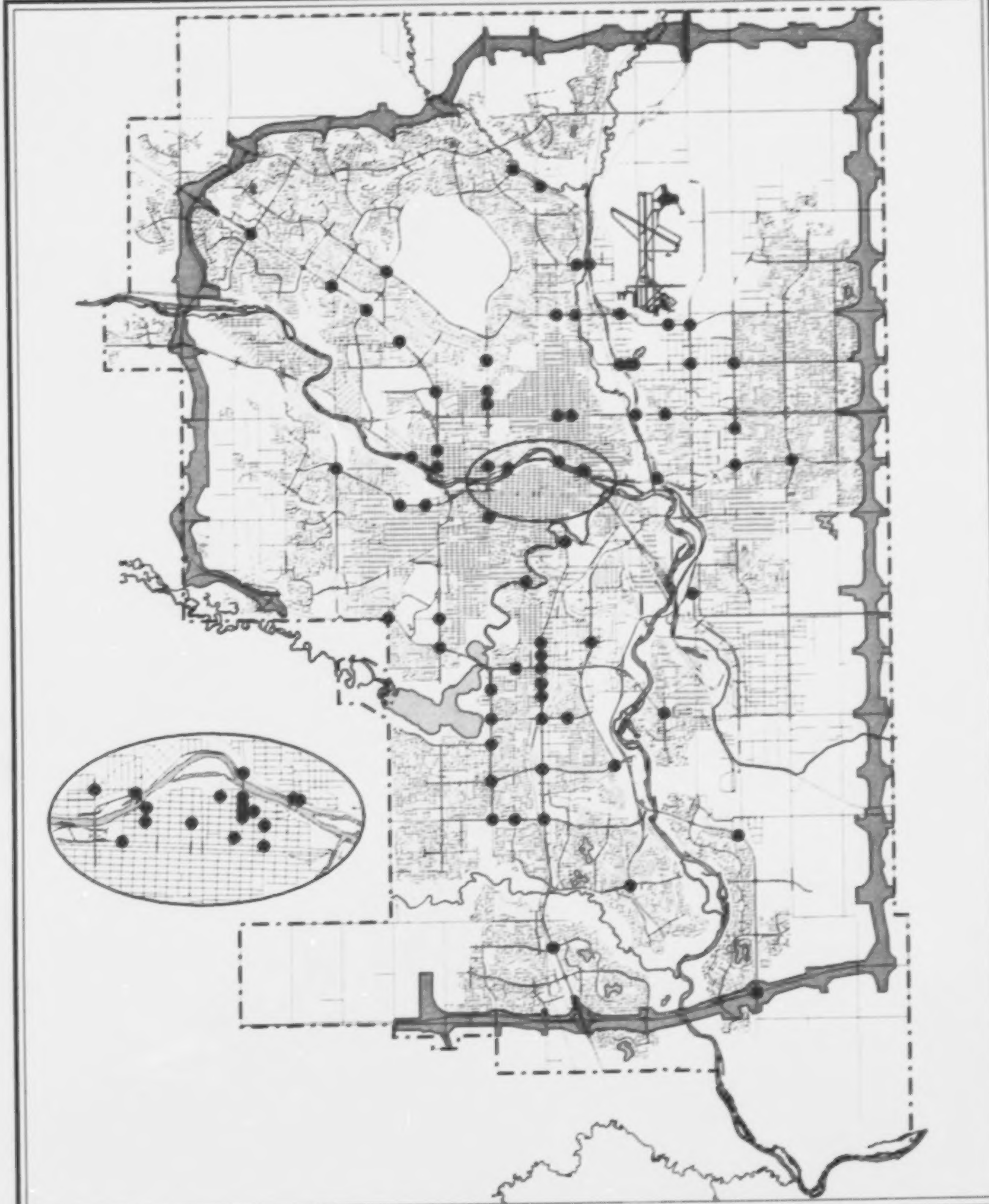
SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY-WIDE
MAP 3


NORTH
NORTHEAST
NORTHWEST
WEST
CENTRE
EAST
SOUTH
SOUTHEAST
02B
02C
02D
03C
03D
03H
03I
02A
02E
02F
02G
03J
PAN
CIN
COV
CHV
ST3
03P
HID
ROC
ROY
CIT
HAM
COU
HAR
03S
ARB
HAW
MAC
SAN
BED
HHB
SAD
TUS
EDG
CIA
SRI
03V
HUN
DBC
MRT
TAR
NPK
01B
SIL
NHU
THO
SKW
CAS
FAL
COR
VAL
VAR
BRE
NHV
GRV
PEG
CRM
GRE
CHW
HPK
GRI
MCI
NAW
HOR
WHI
TEM
01C
COP
BOW
COL
CAM
MOR
BMT
CGR
MON
UOC
UNF
CAP
MOP
TUX
WIN
VIS
SAW
SUN
RUN
PIN
PAT
WSP
COA
WLD
POI
STA
HOU
RDL
REN
MAL
MRL
MPK
ABB
WHL
HIL
CRE
CHN
MER
10A
SPR
MLI
BRD
STR
WGT
RCK
DNW
DNC
DNE
ALB
FHT
APP
RED
CHR
SNA
CON
LMR
VIC
RAM
FLN
GDL
BNK
CLI
ING
SOV
KIL
RIC
ERL
SOC
FLI
SPH
SIG
GBK
YB
DOV
ERI
09E
DIS
GLA
RUT
ALT
BRT
EYA
MNI
EFI
LPK
VAF
CFL
WND
09D
09H
BEL
BUR
FHI
GPK
EAG
OGD
KIN
FAI
GBP
CHK
EFV
GPI
RIV
BYV
HAY
ACA
SFH
S23
OAK
PAL
09L
CED
MPL
DGN
ESH
WBN
WOO
CAN
LKB
BDO
QLD
DOU
SHS
DRG
EVE
PKL
14A
14B
14C
MLR
MID
FPK
MCK
MCT
14M
14E
14F
BRI
SHN
SDC
14G
14N
14O
14H
14I
CHA
14J
14P
CRA
14Q
14S
Multi Family
By Number of Units
0 to 30
31 to 140
141 to 280
0
1 Mile
0
1.6 Km

BUILDING PERMIT APPLICATIONS
FOR NEW MULTI FAMILY UNITS - 1999 (Townhouse and Apartment)



CONGESTED SIGNALIZED INTERSECTIONS - 1996

CAPACITY CONSTRAINT LOCATIONS (A.M. AND/OR P.M. PEAK HOUR)
ACCORDING TO INDUSTRY STANDARD MEASURES

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PLANNING POLICY
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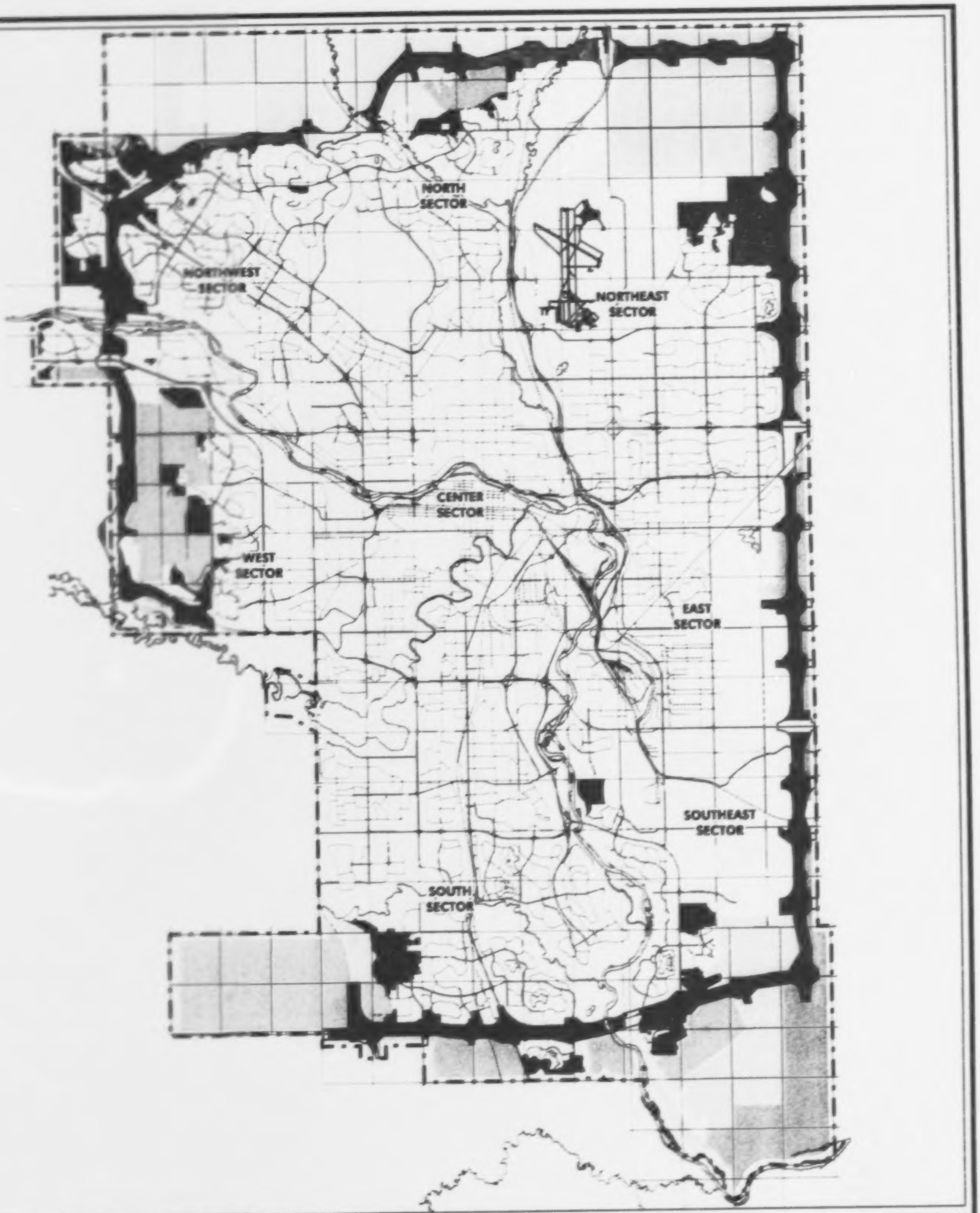
SHORT-TERM GROWTH
MANAGEMENT STRATEGY

CITY-WIDE
MAP 5

[illegible]


NORTH SECTOR
NORTHWEST SECTOR
NORTHEAST SECTOR
CENTER SECTOR
WEST SECTOR
EAST SECTOR
SOUTHEAST SECTOR
SOUTH SECTOR

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

- ■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)
- ▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER, BUT NOT BOTH)
- ☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)
- SECTOR BOUNDARY
- ▨ AREA SUBJECT TO REVIEW
- ■ TRANSPORTATION UTILITY CORRIDOR

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PLANNING AND TRANSPORTATION POLICY
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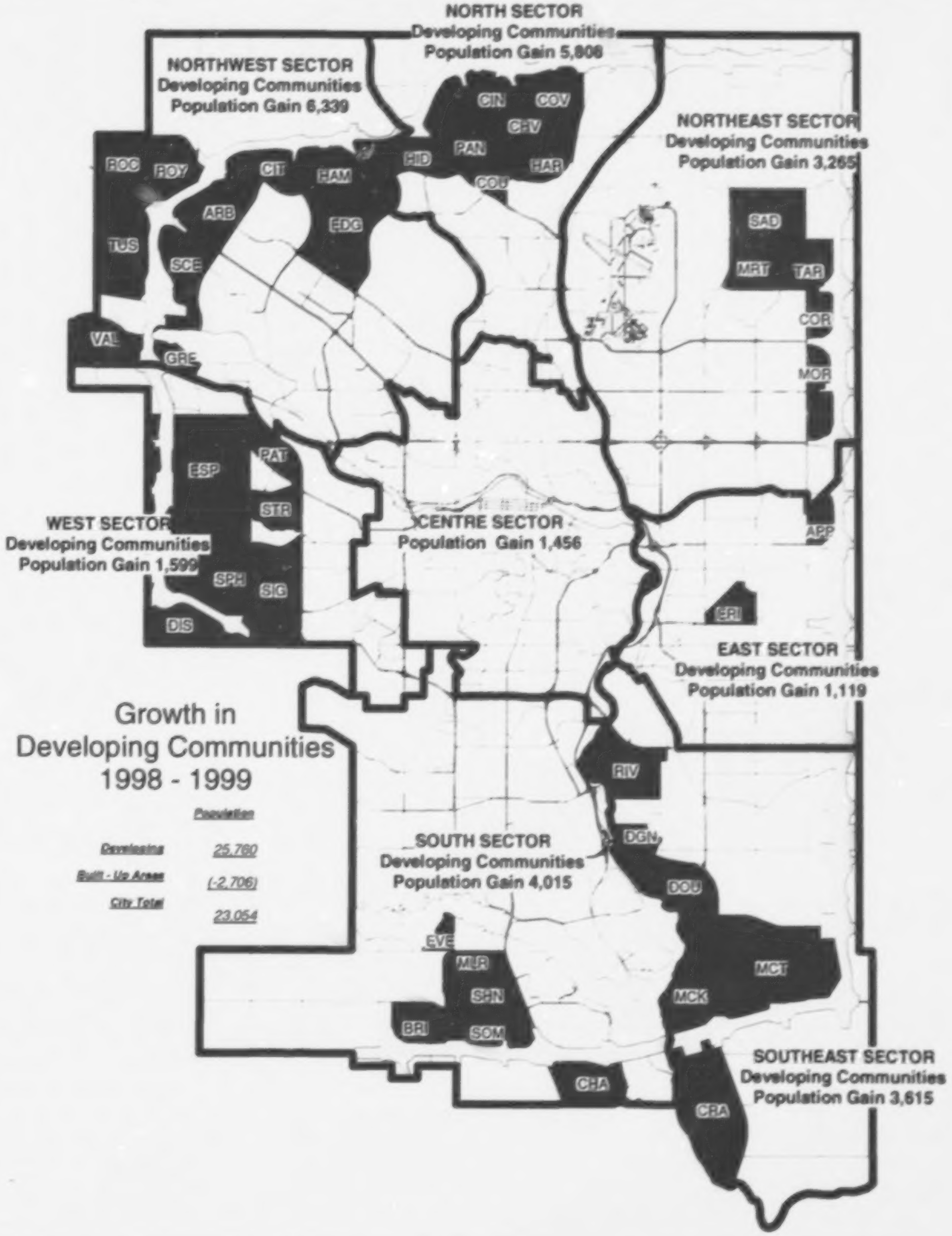
SHORT-TERM GROWTH
MANAGEMENT STRATEGY

CITY-WIDE
MAP 6
o:\plan\growth\report\cw6_rpt.dgn

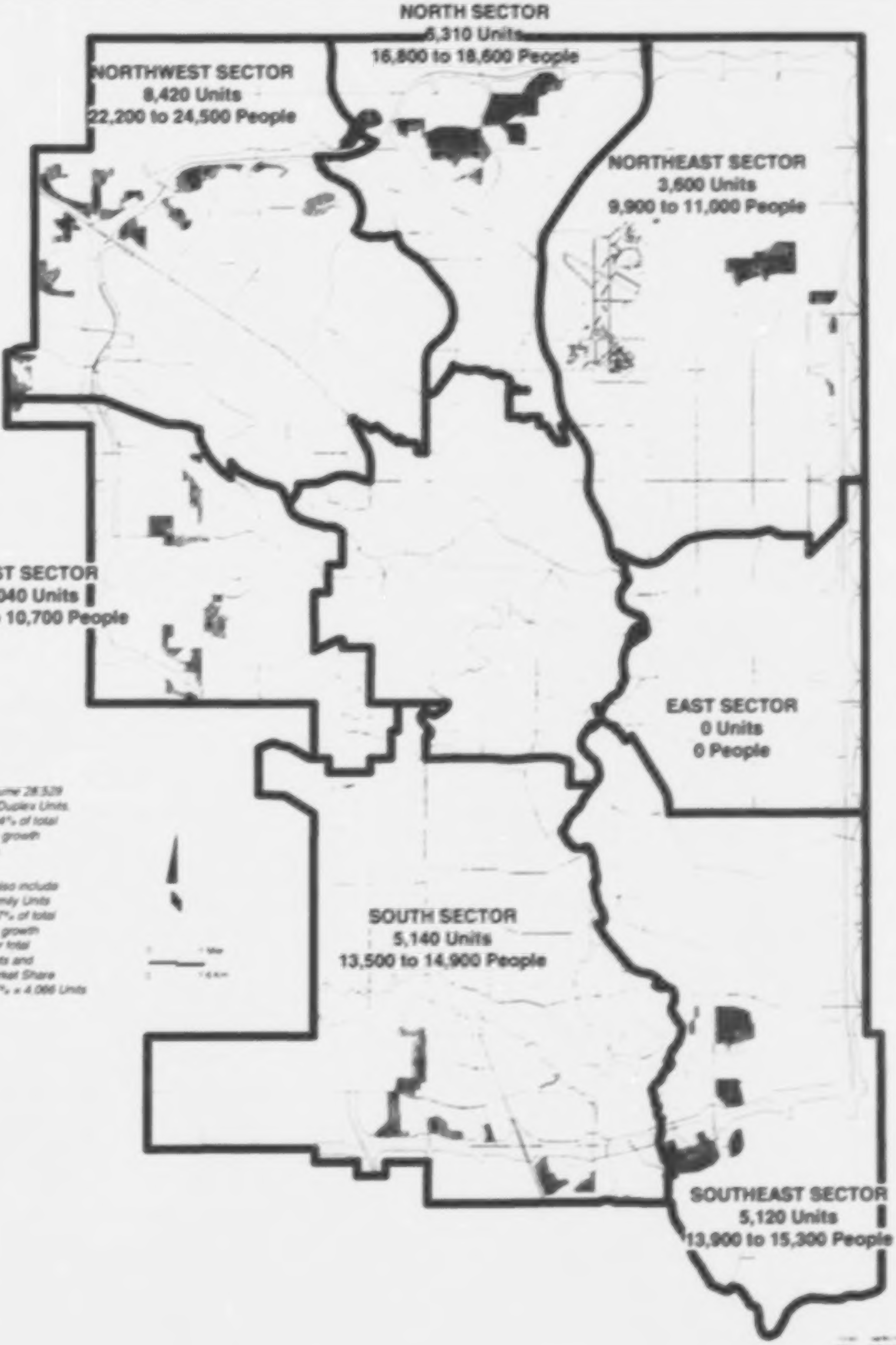

NORTH SECTOR
Developing Communities
Population Gain 5,808
NORTHWEST SECTOR
Developing Communities
Population Gain 6,339
NORTHEAST SECTOR
Developing Communities
Population Gain 3,265
WEST SECTOR
Developing Communities
Population Gain 1,599
CENTRE SECTOR
Population Gain 1,456
EAST SECTOR
Developing Communities
Population Gain 1,119
SOUTH SECTOR
Developing Communities
Population Gain 4,015
SOUTHEAST SECTOR
Developing Communities
Population Gain 3,615
CIN
COV
CHV
PAN
HID
HAR
COU
ROC
ROY
CIT
HAM
ARB
EDG
TUS
SCE
VAL
GRE
SAD
MRT
TAR
COR
MOR
ESP
PAT
STR
SPH
SIG
DIS
APP
ERI
RIV
DGN
DOU
EVE
MLR
SHN
BRI
SOM
MCT
MCK
CHA
CRA

Growth in Developing Communities 1998 - 1999

	Population
Developing	25,760
Built - Up Areas	(-2,706)
City Total	23,054

GROWTH IN DEVELOPING COMMUNITIES
1998 - 1999

CITY-WIDE
MAP 7


NORTH SECTOR
6,310 Units
16,800 to 18,600 People
NORTHWEST SECTOR
8,420 Units
22,200 to 24,500 People
NORTHEAST SECTOR
3,600 Units
9,900 to 11,000 People
WEST SECTOR
4,040 Units
9,700 to 10,700 People
EAST SECTOR
0 Units
0 People
SOUTH SECTOR
5,140 Units
13,500 to 14,900 People
SOUTHEAST SECTOR
5,120 Units
13,900 to 15,300 People

Estimates assume 28,529 Single Family/Duplex Units, representing 94% of total forecasted city growth (see Table 13)

Assumptions also include 4,086 Multi-Family Units representing 47% of total forecasted city growth See Table 2 for total Multi family units and Table 5 for Market Share i.e., 8650 x 47% = 4,086 Units

FORECASTED SUBURBAN GROWTH
2000 - 2004

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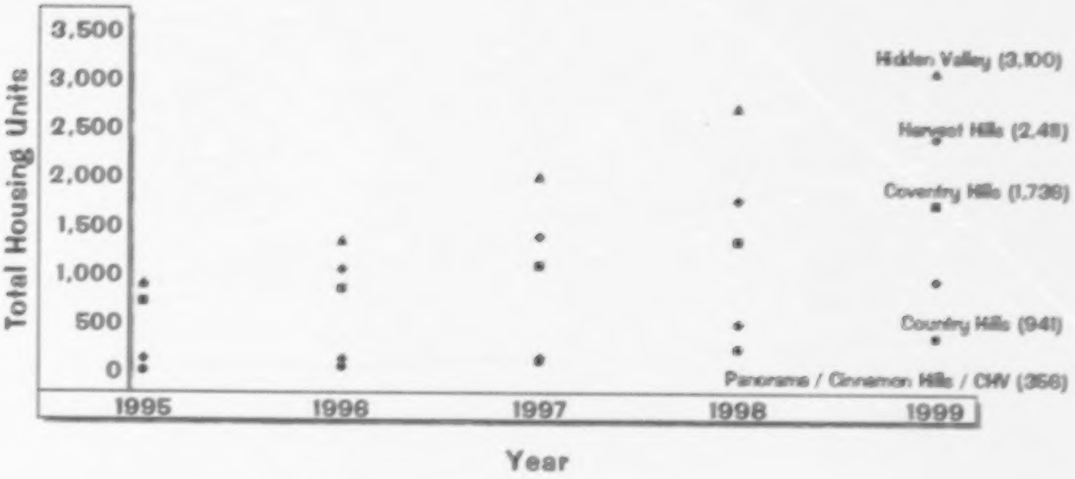
SHORT-TERM GROWTH
MANAGEMENT STRATEGY

CITY-WIDE
MAP 8

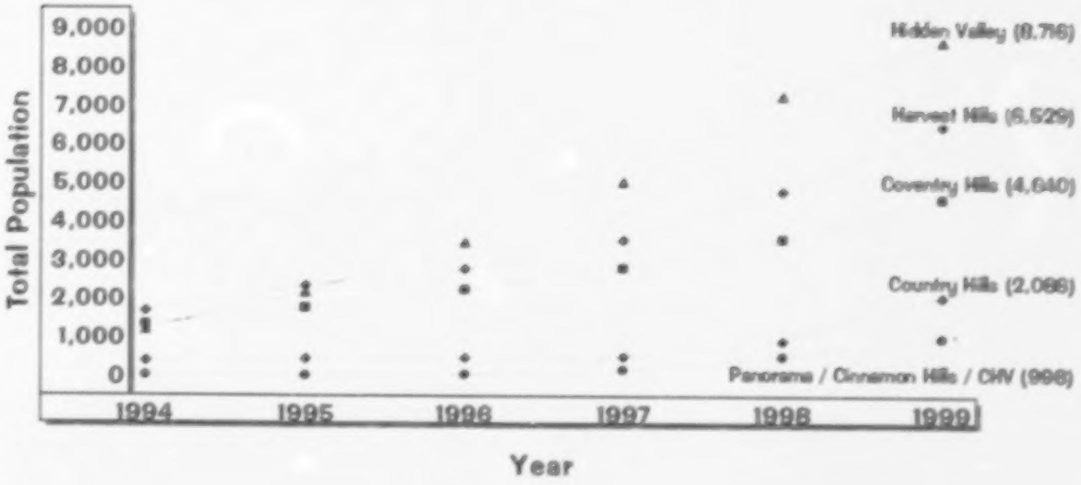
Appendix II

Sector Profiles

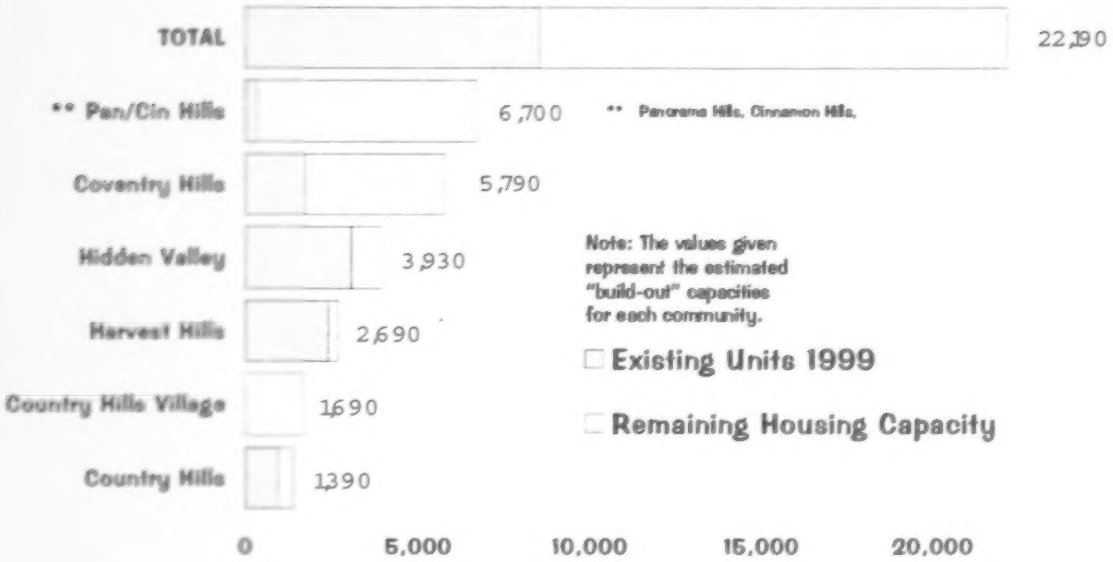
NORTH SECTOR
RECENT GROWTH IN HOUSING



NORTH SECTOR
RECENT GROWTH IN POPULATION

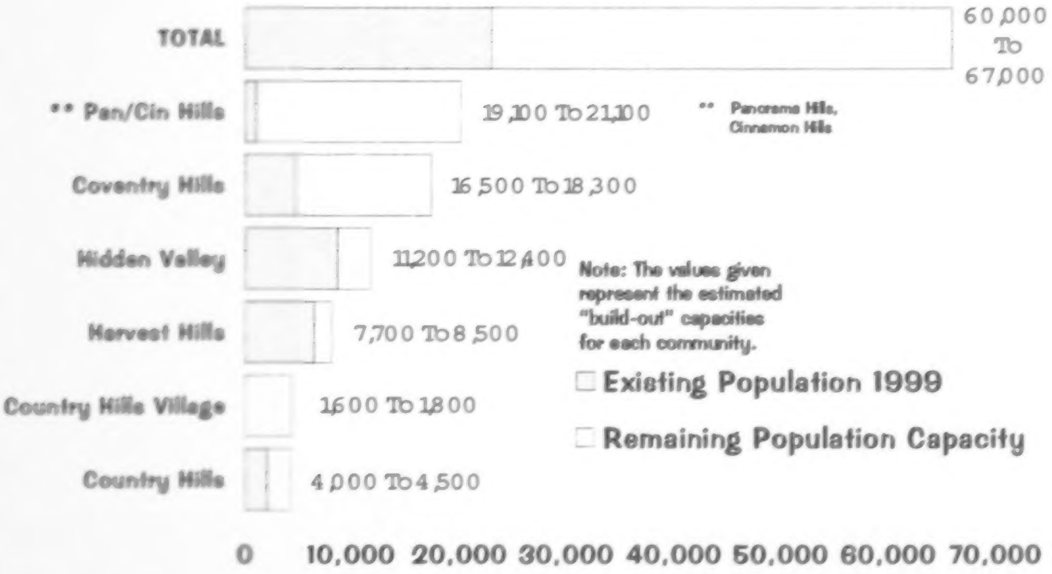


NORTH SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



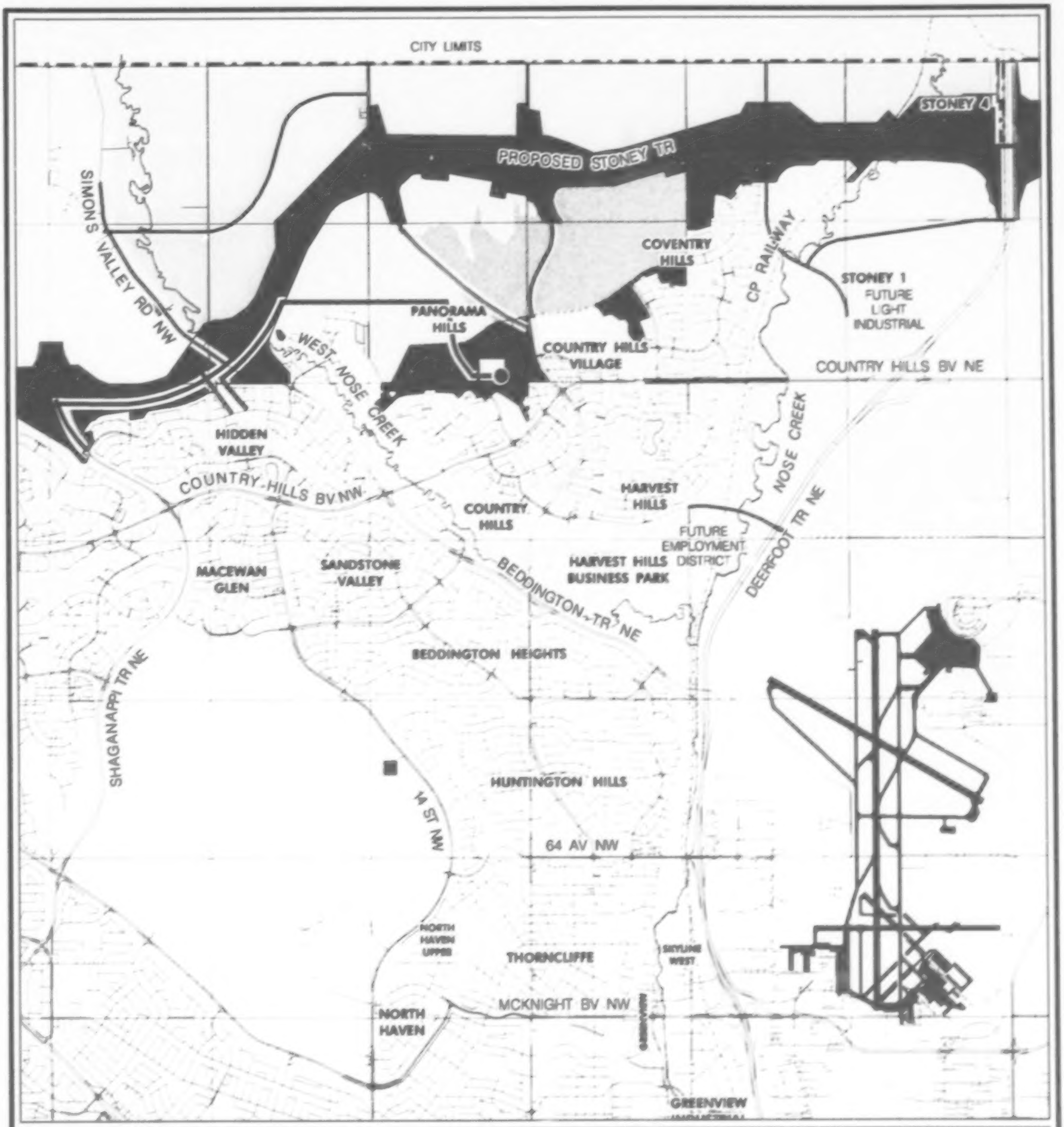
Note: The values given represent the estimated "build-out" capacities for each community.

NORTH SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



Note: The values given represent the estimated "build-out" capacities for each community.

Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations).


CITY LIMITS
STONEY 4
PROPOSED STONEY TR
SIMONS VALLEY RD NW
COVENTRY HILLS
CP RAILWAY
STONEY 1
FUTURE LIGHT INDUSTRIAL
PANORAMA HILLS
WEST NOSE CREEK
COUNTRY HILLS VILLAGE
COUNTRY HILLS BV NE
HIDDEN VALLEY
NOSE CREEK
COUNTRY HILLS BV NW
HARVEST HILLS
COUNTRY HILLS
FUTURE EMPLOYMENT DISTRICT
DEERFOOT TR NE
MACEWAN GLEN
SANDSTONE VALLEY
HARVEST HILLS BUSINESS PARK
BEDDINGTON TR NE
SHAGANAPPI TR NE
BEDDINGTON HEIGHTS
HUNTINGTON HILLS
14 ST NW
64 AV NW
NORTH HAVEN UPPER
THORNCLIFFE
SKYLINE WEST
MCKNIGHT BV NW
NORTH HAVEN
GREENVIEW

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 1 Mile
0 1.6 Km

■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)
▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER BUT NOT BOTH)
☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)
▨ AREA SUBJECT TO REVIEW

— FUTURE SANITARY SEWER TRUNK
— FUTURE STORM SEWER TRUNK
— FUTURE WATER FEEDERMAINS
■ FUTURE RESERVOIR
● FUTURE PUMP STATION

SECTOR BOUNDARY
— FUTURE EXPRESSWAY
— FUTURE MAJOR ROAD
■ TRANSPORTATION UTILITY CORRIDOR

THE CITY OF CALGARY
LAND USE AND MOBILITY
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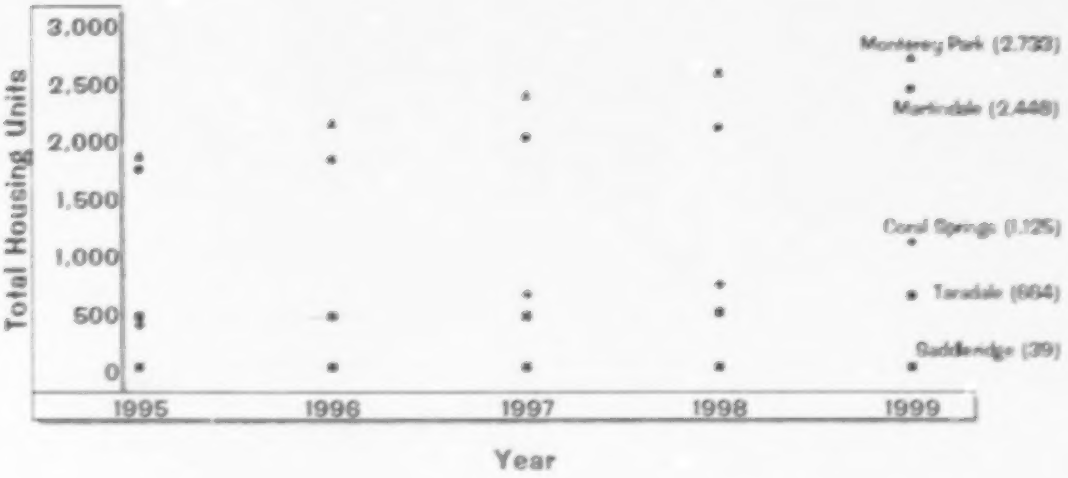
SHORT-TERM GROWTH MANAGEMENT STRATEGY

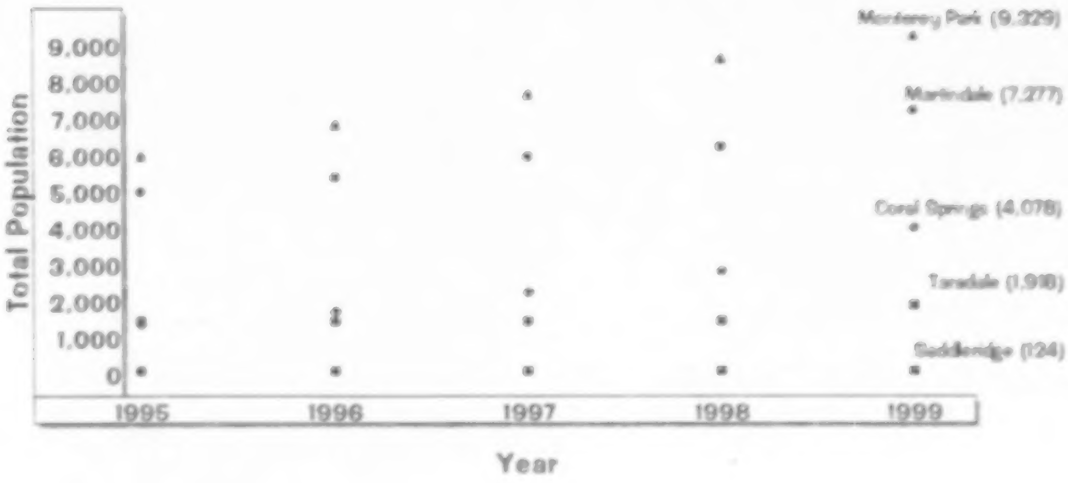
NORTH SECTOR
MAP 1

[illegible]

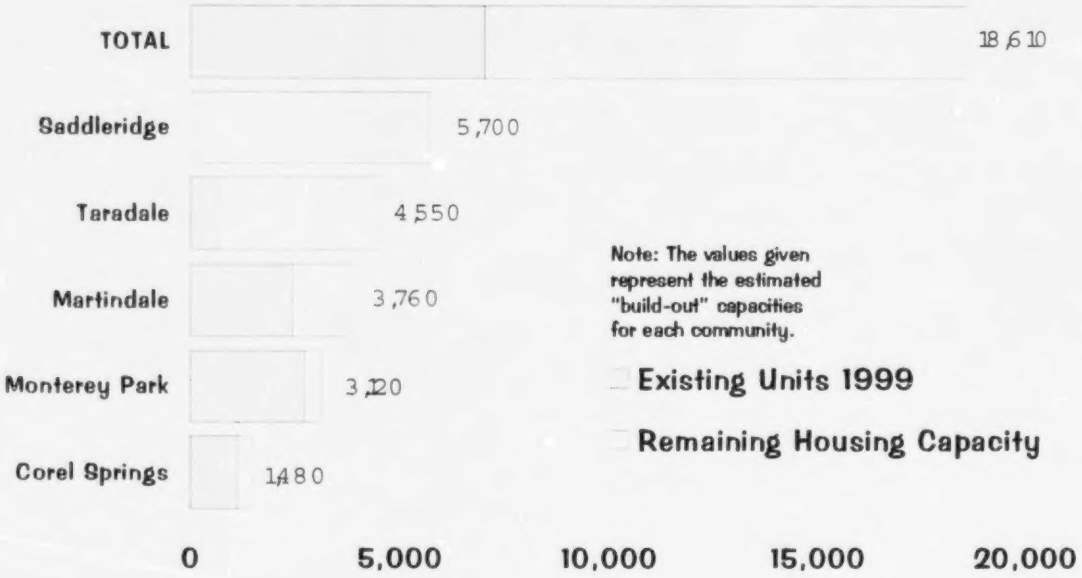
NORTHEAST SECTOR
RECENT GROWTH IN HOUSING



NORTHEAST SECTOR
RECENT GROWTH IN POPULATION

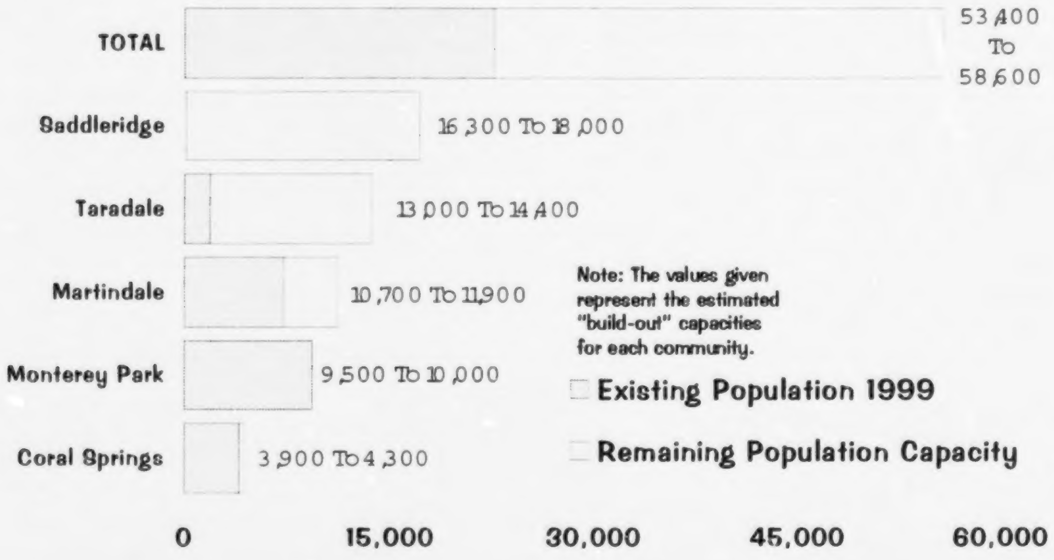


NORTHEAST SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



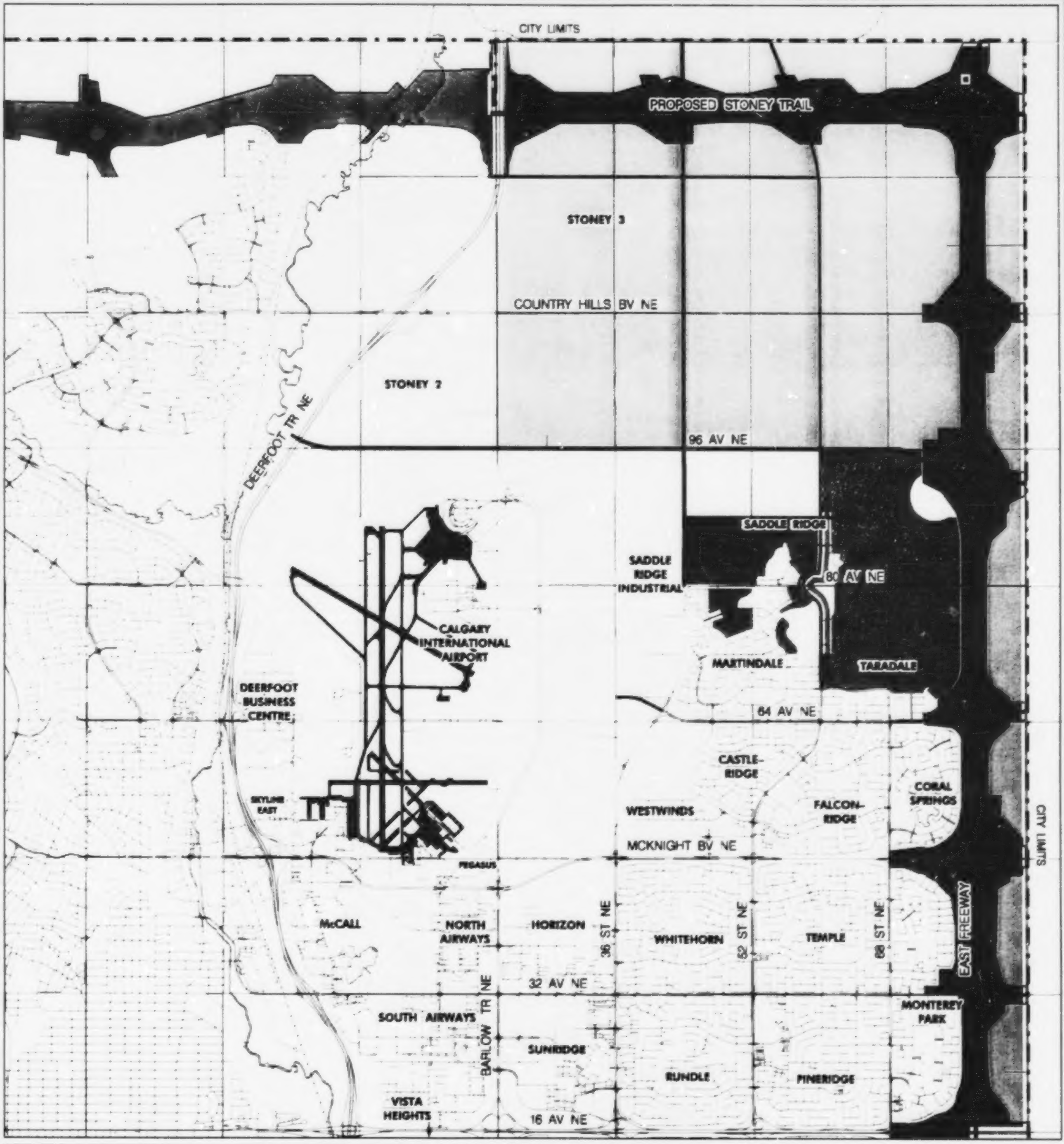
Note: The values given represent the estimated "build-out" capacities for each community.

NORTHEAST SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



Note: The values given represent the estimated "build-out" capacities for each community.

Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations).


CITY LIMITS
PROPOSED STONEY TRAIL
STONEY 3
COUNTRY HILLS BV NE
STONEY 2
DEERFOOT TR NE
96 AV NE
SADDLE RIDGE
SADDLE RIDGE INDUSTRIAL
80 AV NE
CALGARY INTERNATIONAL AIRPORT
MARTINDALE
TARADALE
DEERFOOT BUSINESS CENTRE
64 AV NE
CASTLE-RIDGE
CORAL SPRINGS
SKYLINE EAST
WESTWINDS
FALCON-RIDGE
CITY LIMITS
MCKNIGHT BV NE
PEGASUS
McCALL
NORTH AIRWAYS
HORIZON
36 ST NE
WHITEHORN
52 ST NE
TEMPLE
68 ST NE
EAST FREEWAY
32 AV NE
BARLOW TR NE
SOUTH AIRWAYS
MONTEREY PARK
SUNRIDGE
RUNDLE
PINERIDGE
VISTA HEIGHTS
16 AV NE

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 1 Mile
0 1.6 Km

N

■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)

▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER, BUT NOT BOTH)

☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)

▨ AREA SUBJECT TO REVIEW

— FUTURE SANITARY SEWER TRUNK

— FUTURE STORM SEWER TRUNK

— FUTURE WATER FEEDERMAINS

■ FUTURE RESERVOIR

● FUTURE PUMP STATION

SECTOR BOUNDARY

— FUTURE EXPRESSWAY

— FUTURE MAJOR ROAD

■ TRANSPORTATION UTILITY CORRIDOR

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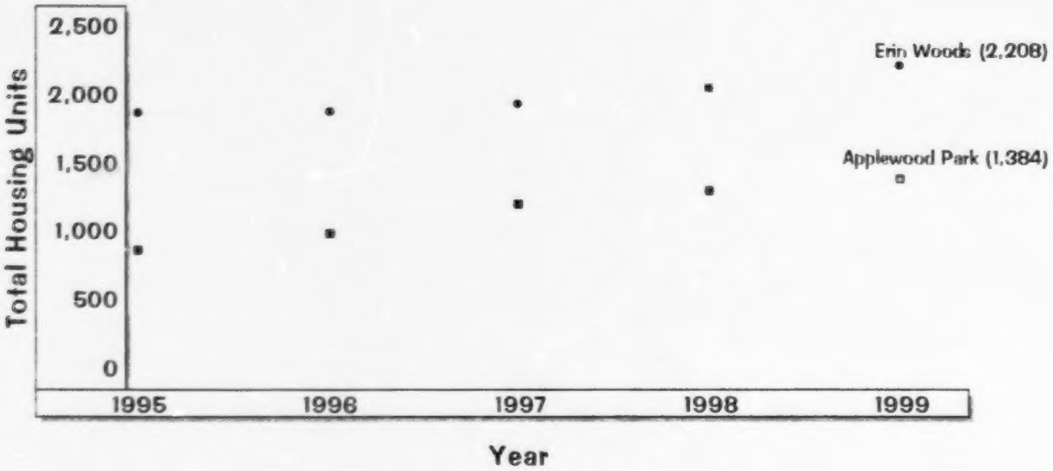
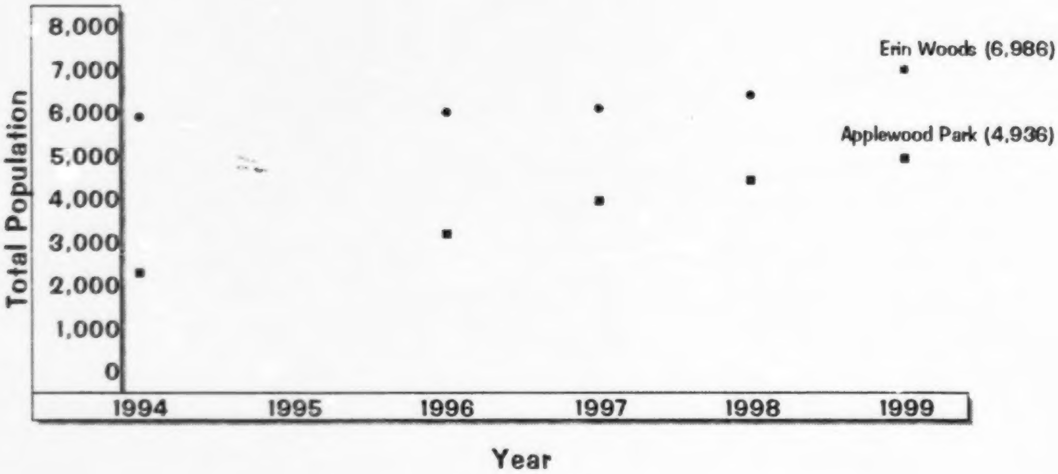
SHORT-TERM GROWTH MANAGEMENT STRATEGY

NORTHEAST SECTOR
MAP 2
c:\plan\growth\report\ne_rpt.dgn

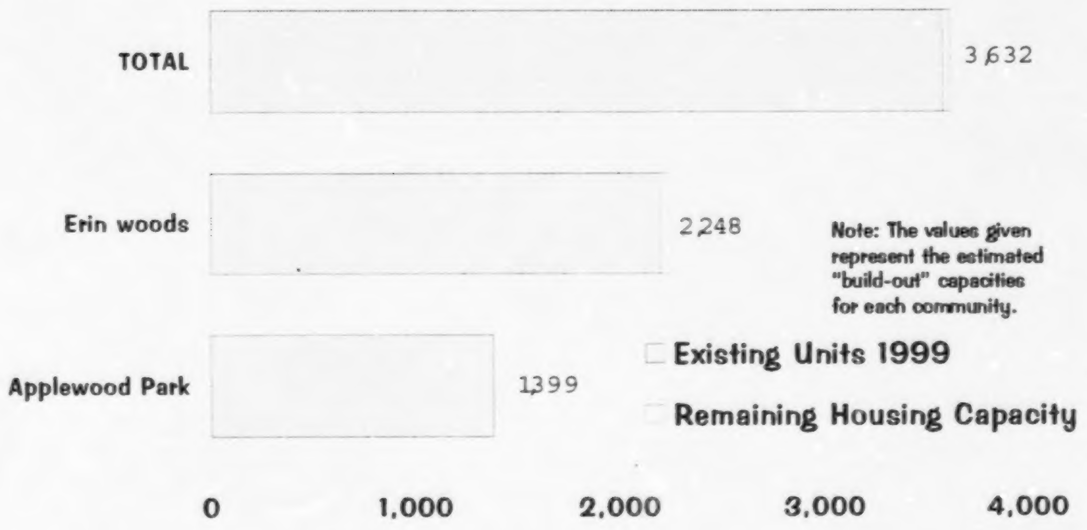
EAST SECTOR
RECENT GROWTH IN HOUSING



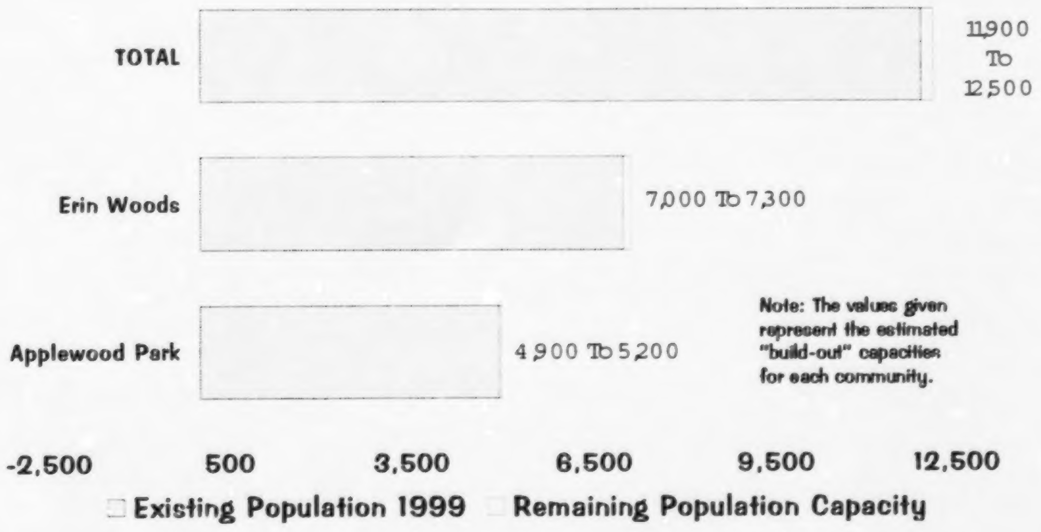
EAST SECTOR
RECENT GROWTH IN POPULATION



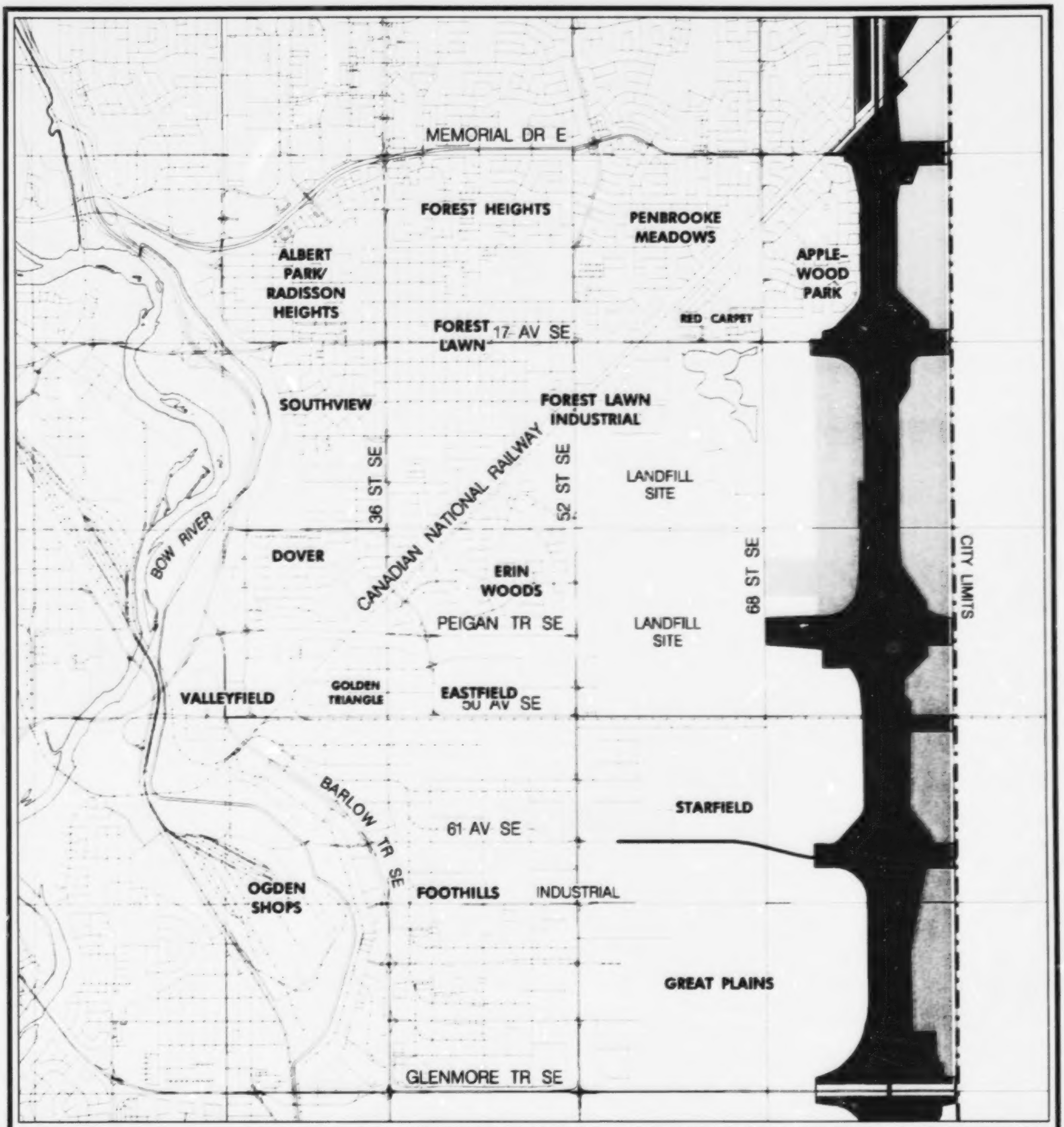
EAST SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



EAST SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations).


MEMORIAL DR E
FOREST HEIGHTS
PENBROOKE MEADOWS
APPLE-WOOD PARK
ALBERT PARK/ RADISSON HEIGHTS
FOREST LAWN
17 AV SE
RED CARPET
SOUTHVIEW
FOREST LAWN INDUSTRIAL
CANADIAN NATIONAL RAILWAY
36 ST SE
52 ST SE
LANDFILL SITE
BOW RIVER
DOVER
ERIN WOODS
68 ST SE
CITY LIMITS
PEIGAN TR SE
LANDFILL SITE
VALLEYFIELD
GOLDEN TRIANGLE
EASTFIELD
50 AV SE
BARLOW TR SE
STARFIELD
61 AV SE
OGDEN SHOPS
FOOTHILLS
INDUSTRIAL
GREAT PLAINS
GLENMORE TR SE

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 1 Mile
0 1.6 Km

- ■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)
- ▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER, BUT NOT BOTH)
- ☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)
- ░ AREA SUBJECT TO REVIEW

- — FUTURE SANITARY SEWER TRUNK
- — FUTURE STORM SEWER TRUNK
- — FUTURE WATER FEEDERMAINS
- ■ FUTURE RESERVOIR
- ● FUTURE PUMP STATION

- SECTOR BOUNDARY
- — FUTURE EXPRESSWAY
- — FUTURE MAJOR ROAD
- ■ TRANSPORTATION UTILITY CORRIDOR

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SHORT-TERM GROWTH MANAGEMENT STRATEGY

EAST SECTOR
MAP 3
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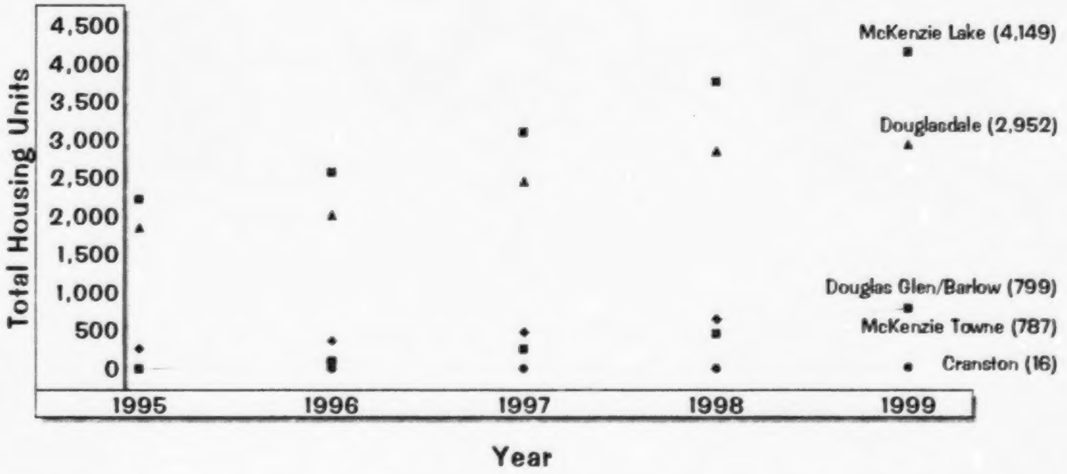
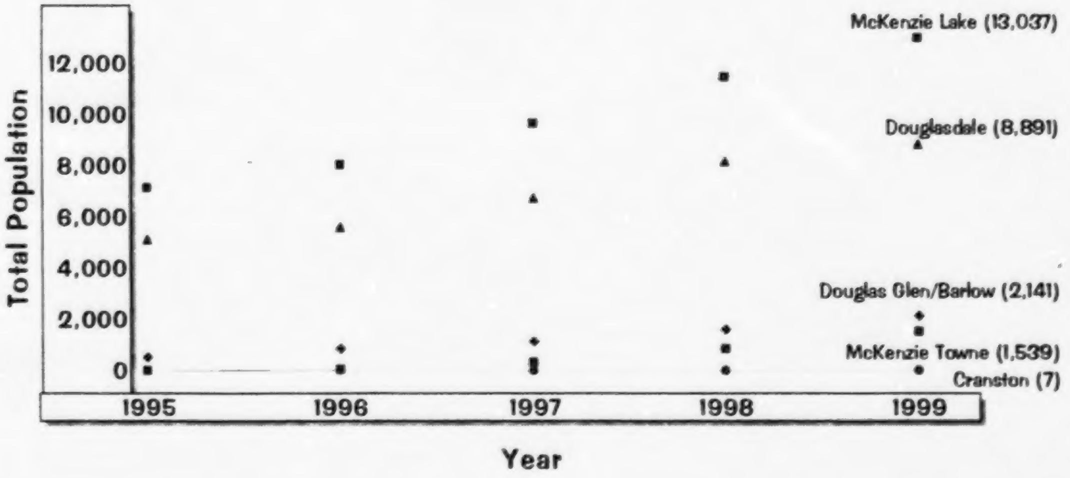
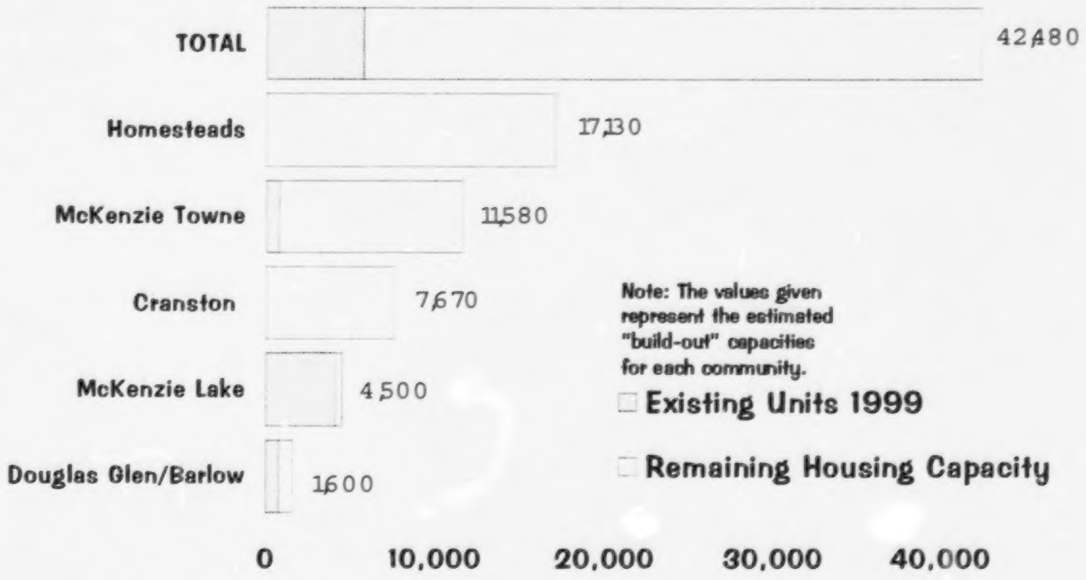
SOUTHEAST SECTOR
RECENT GROWTH IN HOUSING



SOUTHEAST SECTOR
RECENT GROWTH IN POPULATION

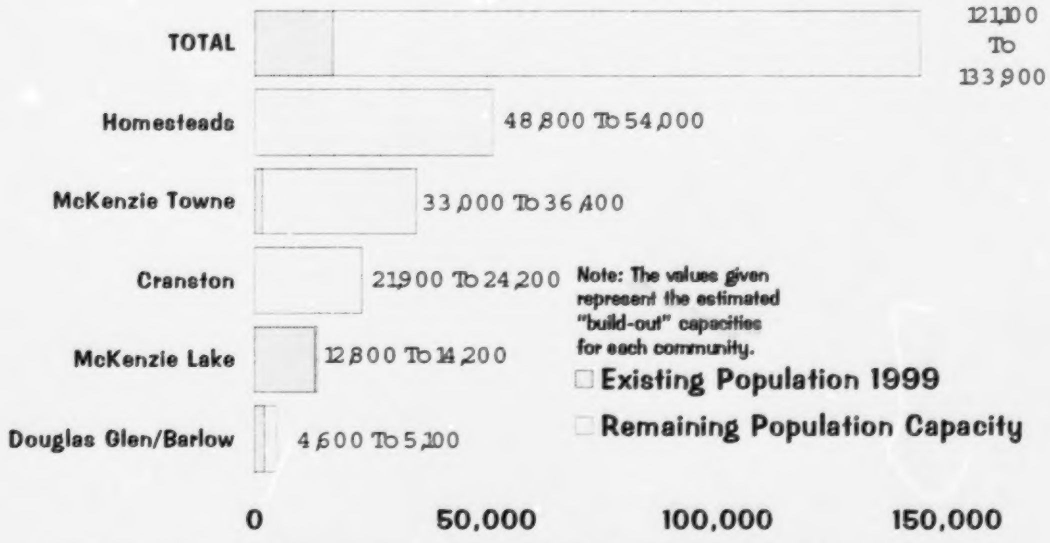


SOUTHEAST SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



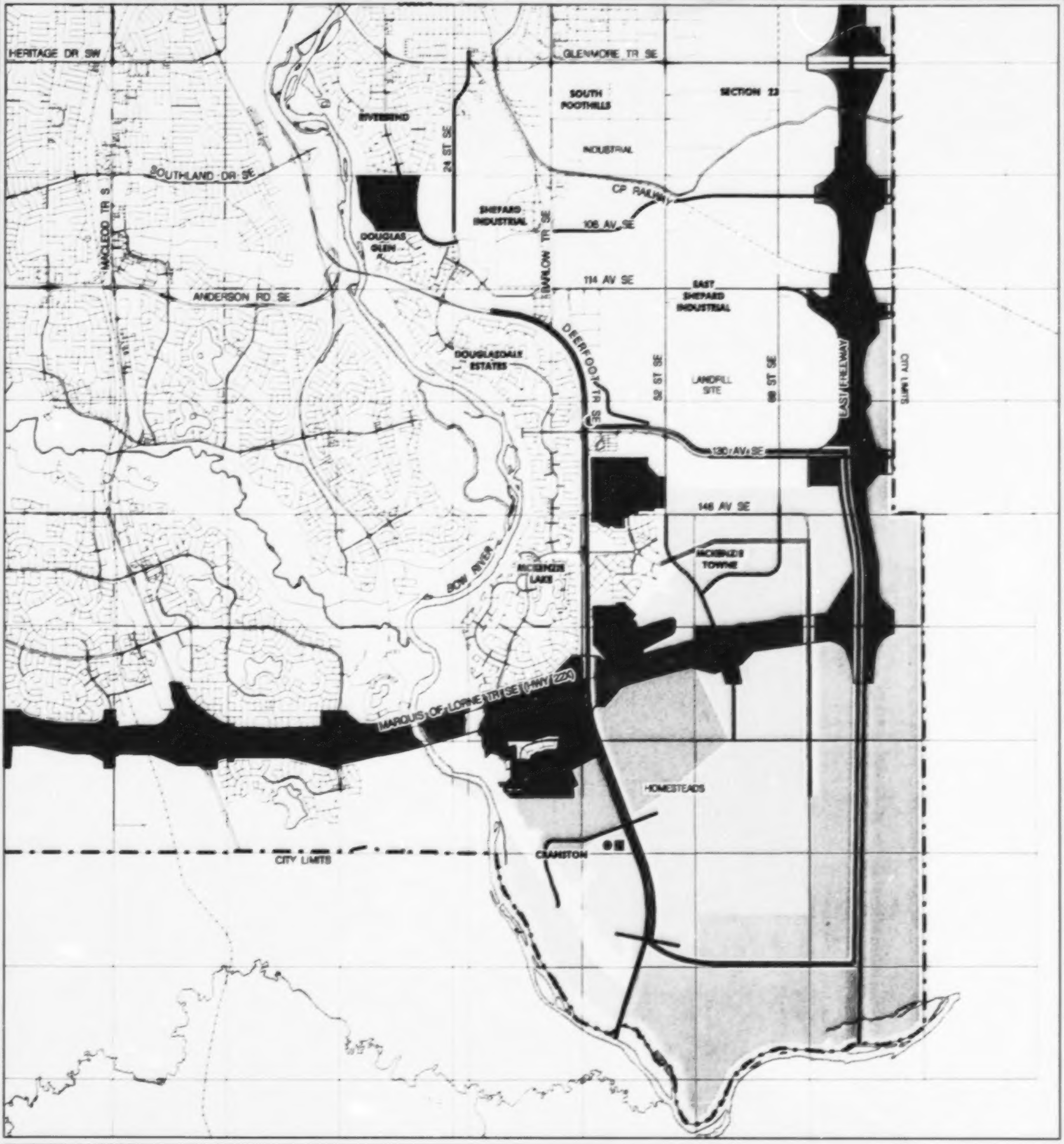
Note: The values given represent the estimated "build-out" capacities for each community.

SOUTHEAST SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



Note: The values given represent the estimated "build-out" capacities for each community.

Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations).


HERITAGE DR SW
GLENMORE TR SE
SOUTH FOOTHILLS
SECTION 23
RIVERBEND
24 ST SE
INDUSTRIAL
SOUTHLAND DR SE
MACLEOD TR S
CP RAILWAY
SHEPARD INDUSTRIAL
106 AV SE
DOUGLAS GLEN
BARLOW TR SE
114 AV SE
ANDERSON RD SE
EAST SHEPARD INDUSTRIAL
DEERFOOT TR SE
DOUGLASDALE ESTATES
52 ST SE
LANDFILL SITE
88 ST SE
EAST FREEWAY
CITY LIMITS
130 AV SE
146 AV SE
MCKENZIE TOWNE
MCKENZIE LAKE
BOW RIVER
MARQUIS OF LORNE TR SE (HWY 22X)
HOMESTEADS
CRANSTON
CITY LIMITS

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 1 Mile
0 1.6 Km

■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)
▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER, BUT NOT BOTH)
☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)
▨ AREA SUBJECT TO REVIEW

— FUTURE SANITARY SEWER TRUNK
— FUTURE STORM SEWER TRUNK
— FUTURE WATER FEEDERMAINS
■ FUTURE RESERVOIR
● FUTURE PUMP STATION

SECTOR BOUNDARY
— FUTURE EXPRESSWAY
— FUTURE MAJOR ROAD
■ TRANSPORTATION UTILITY CORRIDOR

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SHORT-TERM GROWTH
MANAGEMENT STRATEGY

SOUTHEAST SECTOR
MAP 4

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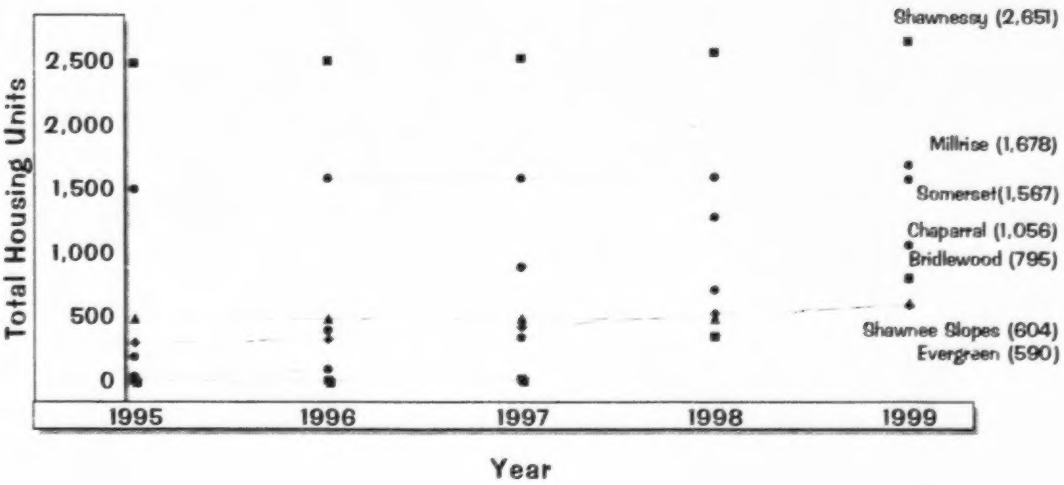
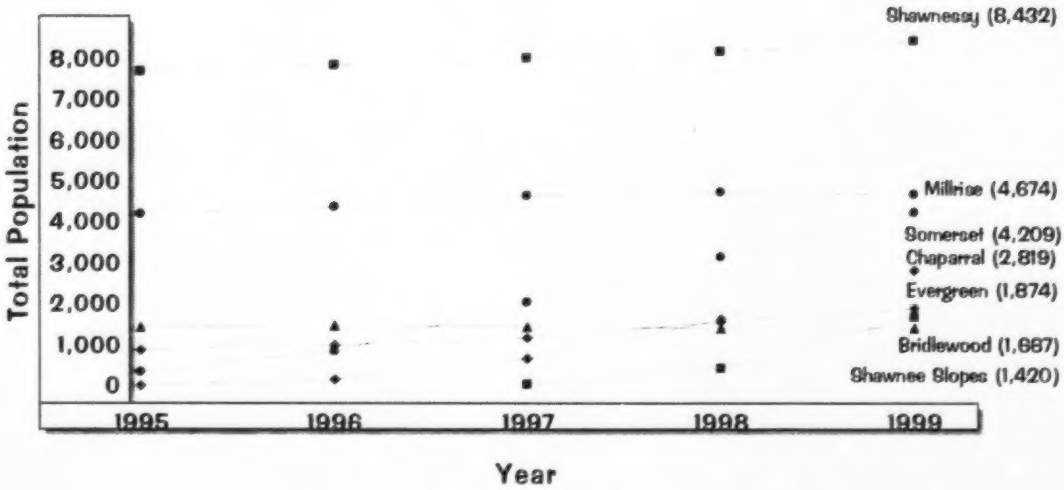
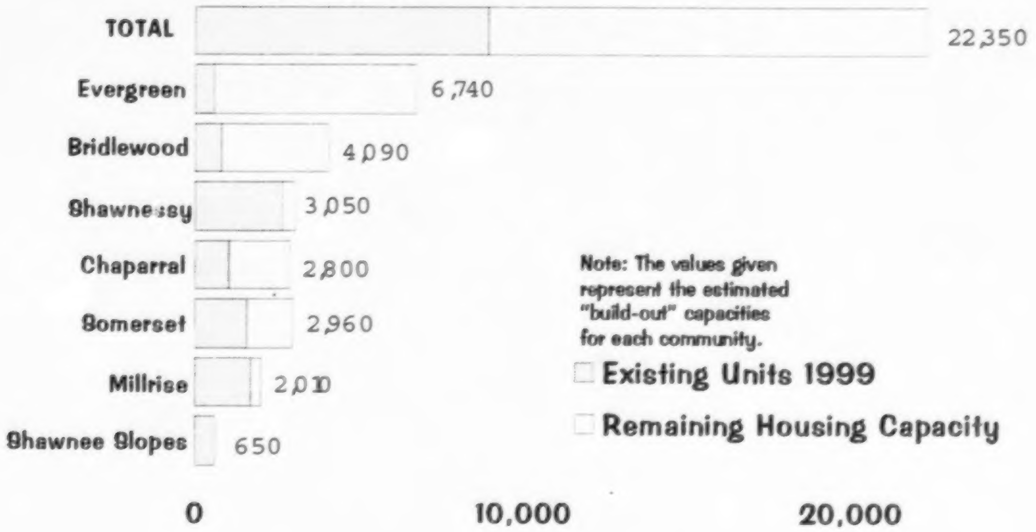
SOUTH SECTOR
RECENT GROWTH IN HOUSING



SOUTH SECTOR
RECENT GROWTH IN POPULATION

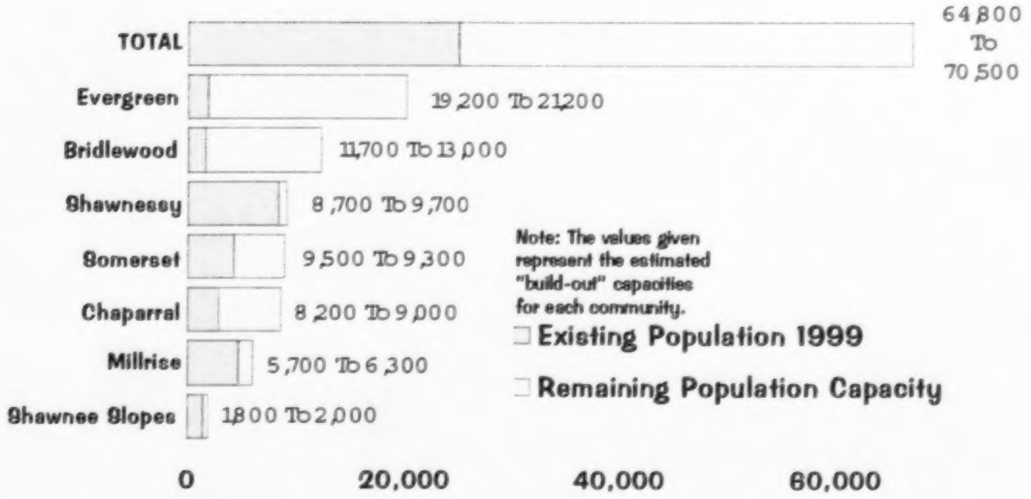


SOUTH SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



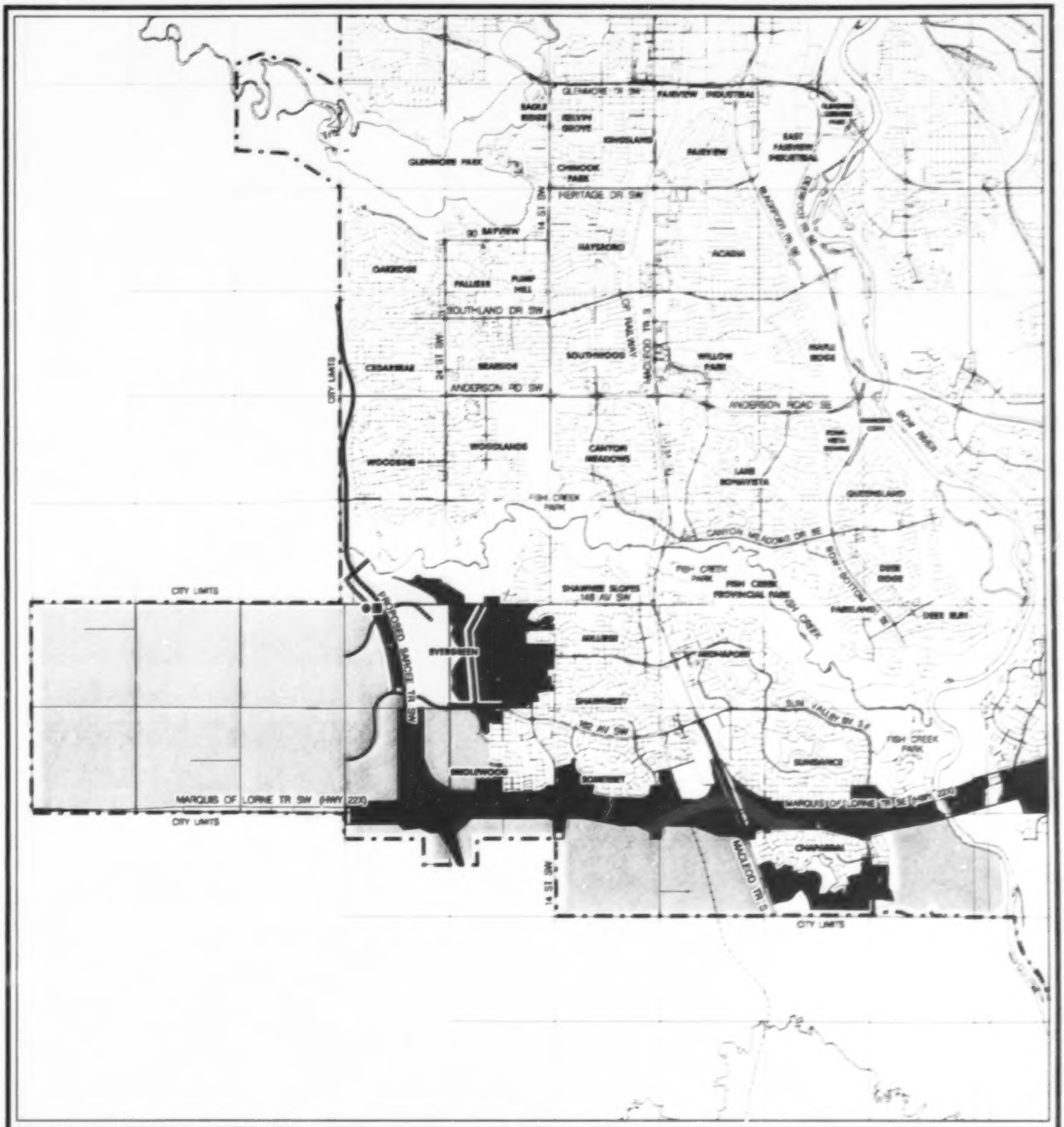
Note: The values given represent the estimated "build-out" capacities for each community.

SOUTH SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



Note: The values given represent the estimated "build-out" capacities for each community.

Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations).


GLENMORE TR SW
FAIRVIEW INDUSTRIAL
EAGLE RIDGE
KELVIN GROVE
KINGSLAND
FAIRVIEW
EAST FAIRVIEW INDUSTRIAL
GLENMORE PARK
CHINOOK PARK
HERITAGE DR SW
14 ST SW
BAYVIEW
HAYSBORO
ACADIA
BLACKFOOT TR SE
DEERFOOT TR SE
OAKRIDGE
PALLISER
PUMP HILL
SOUTHLAND DR SW
CP RAILWAY
MACLEOD TR S
SOUTHWOOD
WILLOW PARK
MAPLE RIDGE
CITY LIMITS
CEDARBRAE
24 ST SW
BRAESIDE
ANDERSON RD SW
ANDERSON ROAD SE
BOW RIVER
WOODBINE
WOODLANDS
CANYON MEADOWS
LAKE BONAVISTA
QUEENSLAND
FISH CREEK PARK
CANYON MEADOWS DR SE
BOW BOTTOM TR SE
DEER RIDGE
SHAWNEE SLOPES
146 AV SW
FISH CREEK PROVINCIAL PARK
FISH CREEK
PARKLAND
DEER RUN
PROPOSED SARCEE TR SW
EVERGREEN
MILLRISE
MIDNAPORE
SHAWNESSY
SUN VALLEY BV SE
162 AV SW
SUNDANCE
BRIDLEWOOD
SOMERSET
MARQUIS OF LORNE TR SW (HWY 22X)
MARQUIS OF LORNE TR SE (HWY 22X)
CHAPARRAL

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 — 1 Mile
0 — 1.6 Km

■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)	— FUTURE SANITARY SEWER TRUNK	SECTOR BOUNDARY
▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER BUT NOT BOTH)	— FUTURE STORM SEWER TRUNK	— FUTURE EXPRESSWAY
☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)	— FUTURE WATER FEEDERMAINS	— FUTURE MAJOR ROAD
▨ AREA SUBJECT TO REVIEW	■ FUTURE RESERVOIR	■ TRANSPORTATION UTILITY CORRIDOR
	● FUTURE PUMP STATION	

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SHORT-TERM GROWTH MANAGEMENT STRATEGY

SOUTH SECTOR
MAP 5

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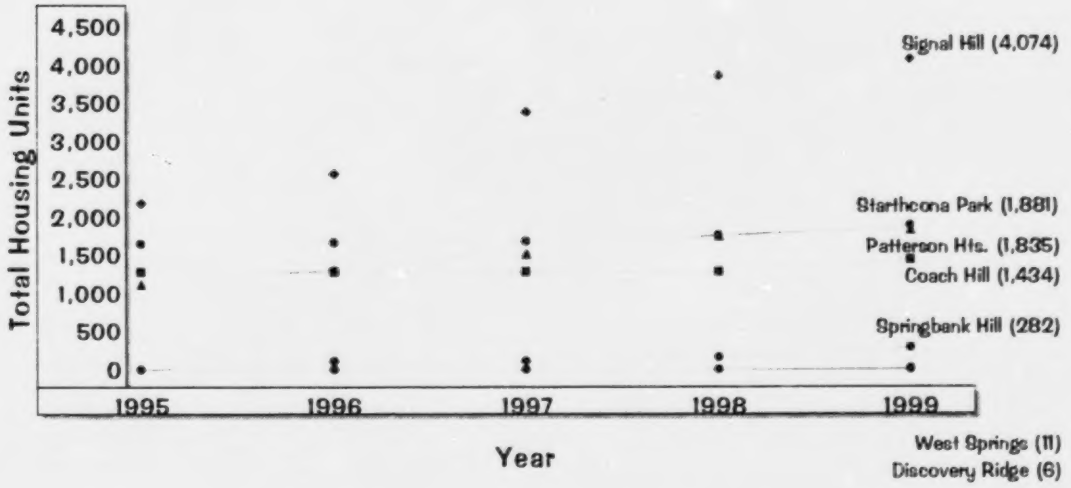
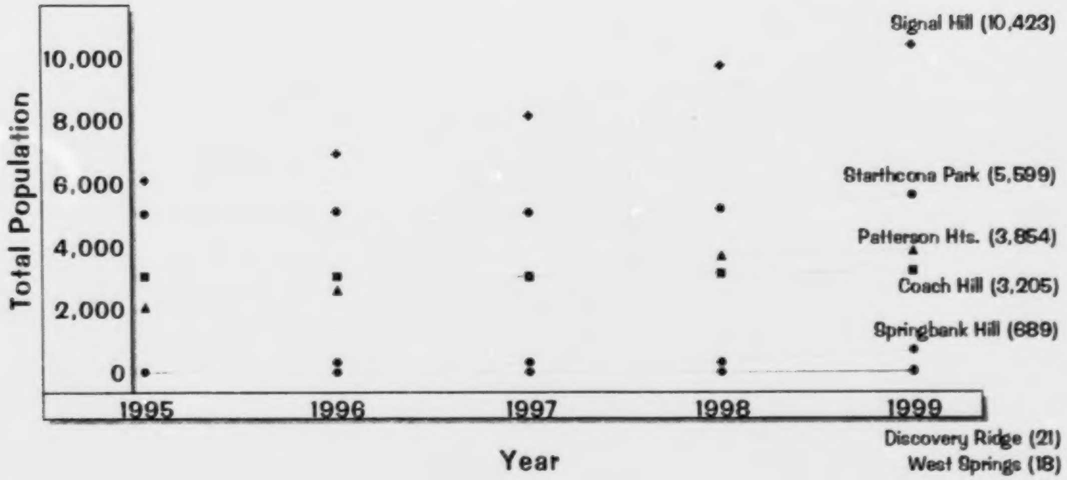
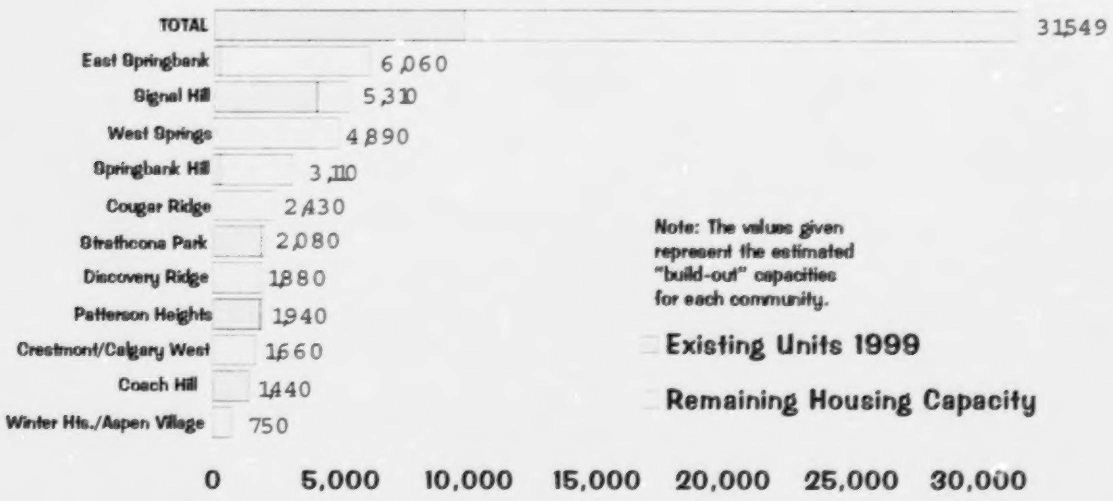
WEST SECTOR
RECENT GROWTH IN HOUSING



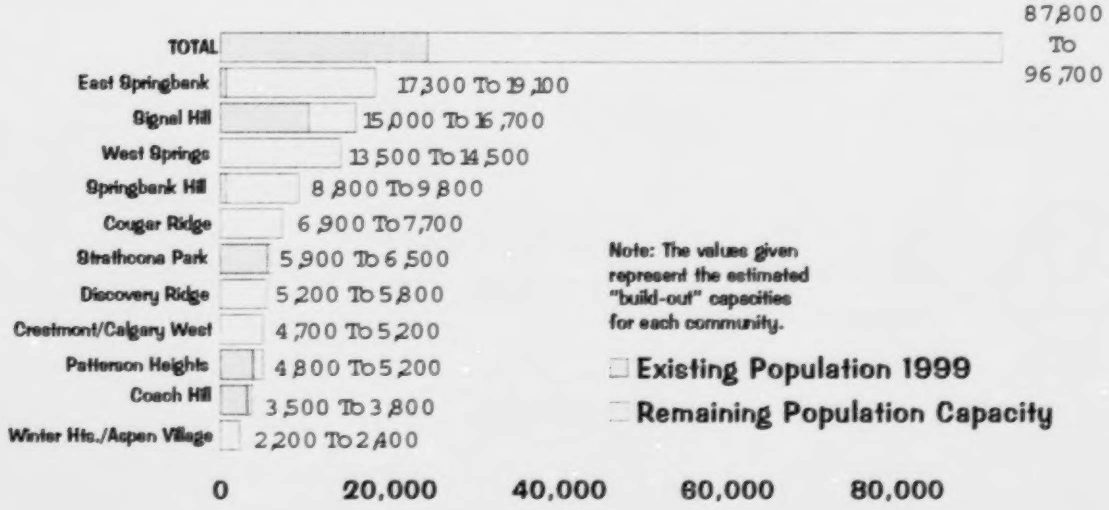
WEST SECTOR
RECENT GROWTH IN POPULATION



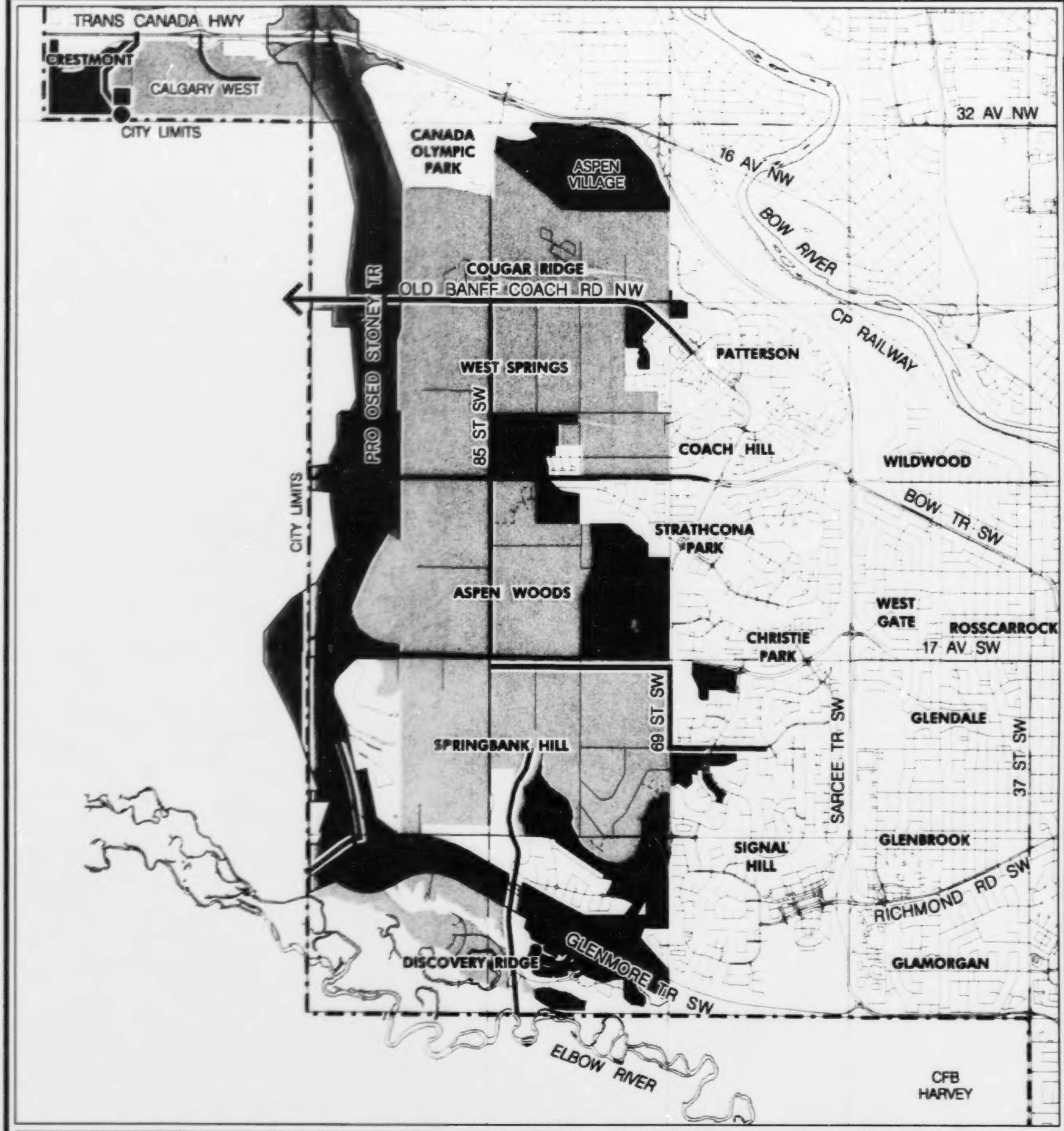
WEST SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



WEST SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations).


TRANS CANADA HWY
CRESTMONT
CALGARY WEST
CITY LIMITS
32 AV NW
CANADA OLYMPIC PARK
ASPEN VILLAGE
16 AV NW
BOW RIVER
COUGAR RIDGE
OLD BANFF COACH RD NW
CP RAILWAY
PATTERSON
PRO OSED STONEY TR
WEST SPRINGS
85 ST SW
COACH HILL
WILDWOOD
BOW TR SW
CITY LIMITS
STRATHCONA PARK
ASPEN WOODS
WEST GATE
ROSSCARROCK
CHRISTIE PARK
17 AV SW
69 ST SW
GLENDALE
SPRINGBANK HILL
SARCEE TR SW
37 ST SW
SIGNAL HILL
GLENBROOK
RICHMOND RD SW
DISCOVERY RIDGE
GLAMORGAN
GLENMORE TR SW
ELBOW RIVER
CFB HARVEY

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 — 1 Mile
0 — 1.6 Km

■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)
▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER BUT NOT BOTH)
☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)
▢ AREA SUBJECT TO REVIEW

— FUTURE SANITARY SEWER TRUNK
— FUTURE STORM SEWER TRUNK
— FUTURE WATER FEEDERMAINS
■ FUTURE RESERVOIR
● FUTURE PUMP STATION

SECTOR BOUNDARY
— FUTURE EXPRESSWAY
— FUTURE MAJOR ROAD
■ TRANSPORTATION UTILITY CORRIDOR

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SHORT-TERM GROWTH MANAGEMENT STRATEGY

WEST SECTOR
MAP 6
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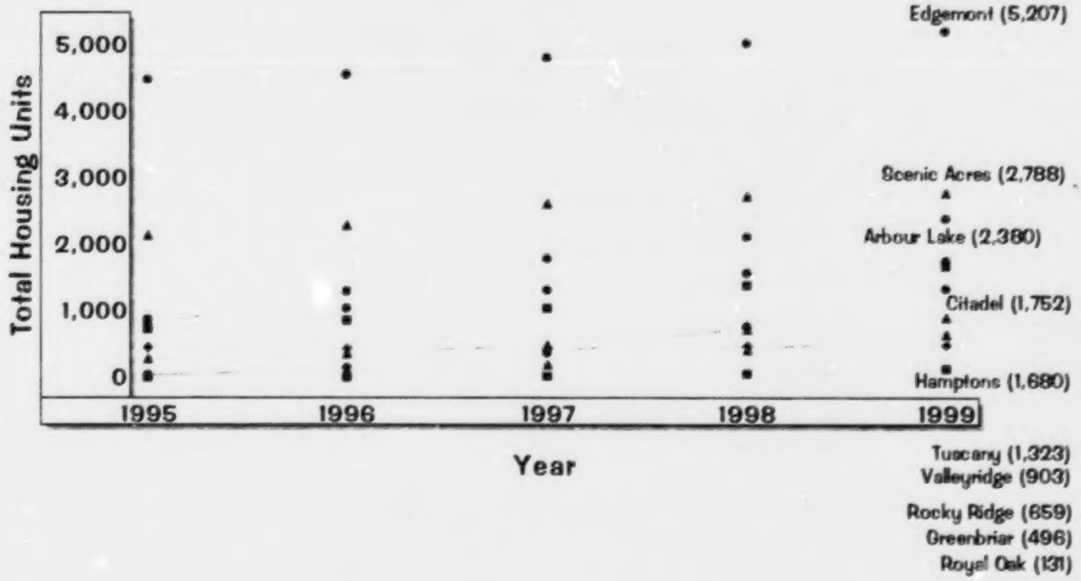
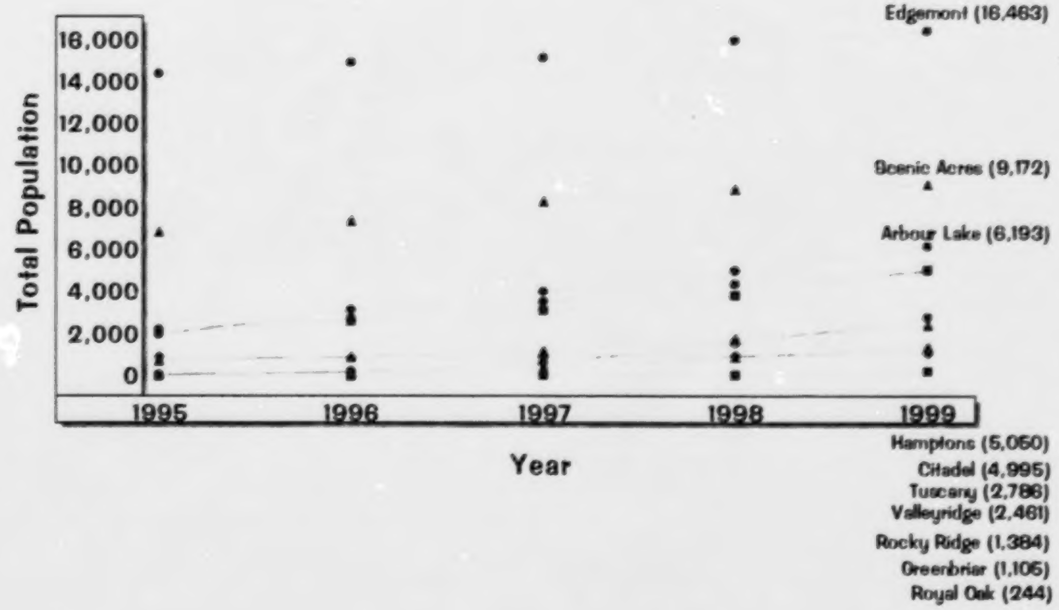
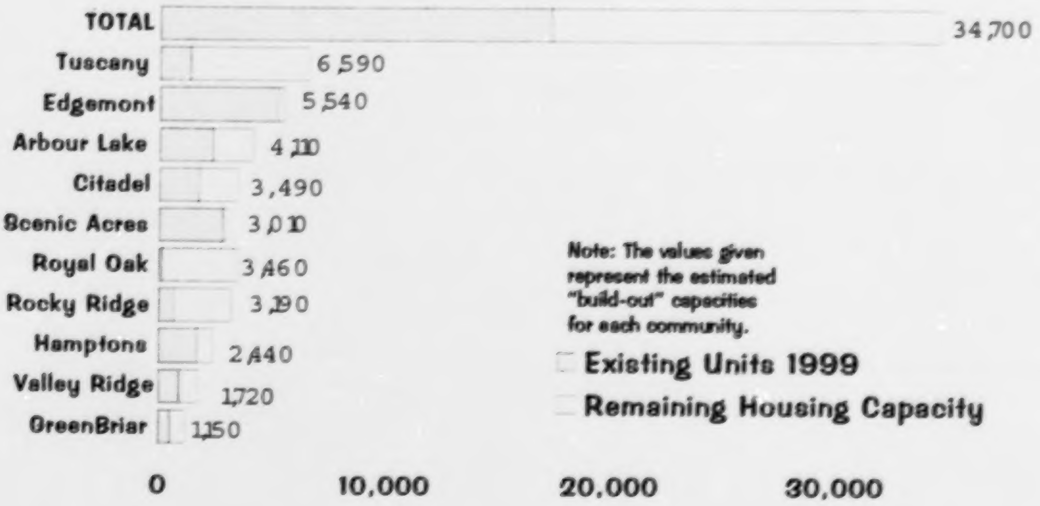
NORTHWEST SECTOR
RECENT GROWTH IN HOUSING



NORTHWEST SECTOR
RECENT GROWTH IN POPULATION

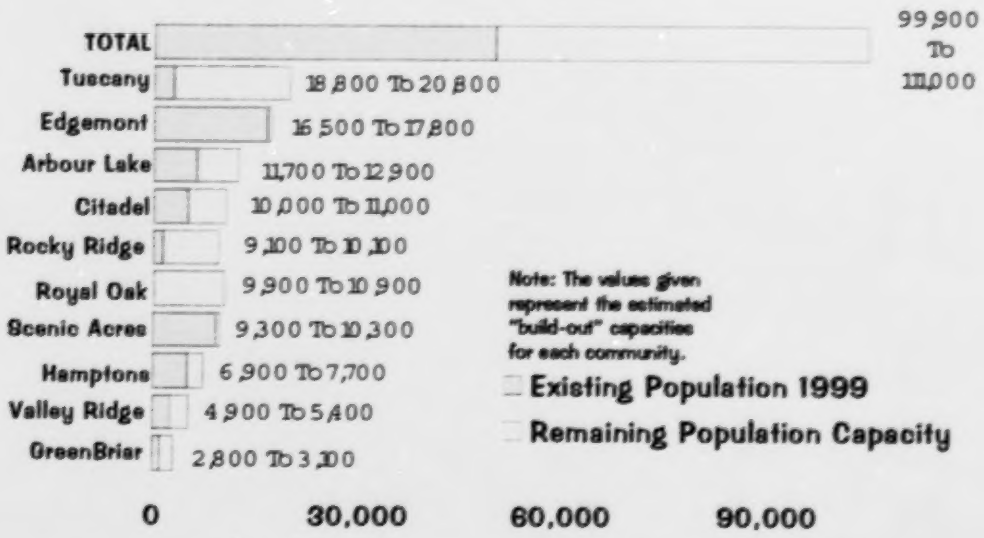


NORTHWEST SECTOR
HOUSING CAPACITY OF DEVELOPING COMMUNITIES



Note: The values given represent the estimated "build-out" capacities for each community.

NORTHWEST SECTOR
POPULATION CAPACITY OF DEVELOPING COMMUNITIES



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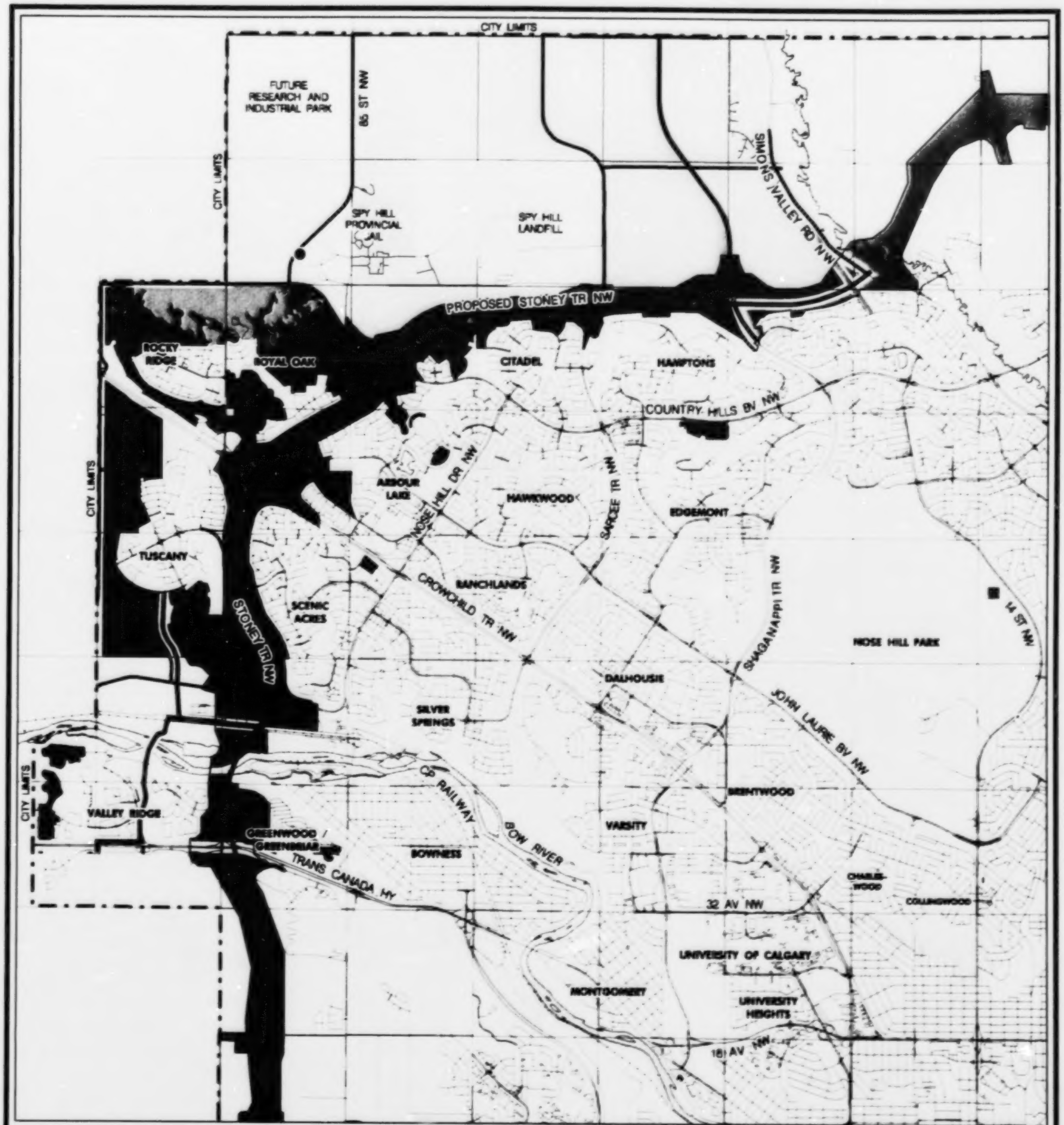
CITY LIMITS
FUTURE RESEARCH AND INDUSTRIAL PARK
85 ST NW
SPY HILL PROVINCIAL JAIL
SPY HILL LANDFILL
SIMONS VALLEY RD NW
PROPOSED STONEY TR NW
ROCKY RIDGE
ROYAL OAK
CITADEL
HAMPTONS
COUNTRY HILLS BV NW
ARBOUR LAKE
NOSE HILL DR NW
HAWKWOOD
SARCEE TR NW
EDGEMONT
TUSCANY
CROWCHILD TR NW
RANCHLANDS
SCENIC ACRES
STONEY TR NW
SHAGANAPPI TR NW
NOSE HILL PARK
14 ST NW
DALHOUSIE
JOHN LAURIE BV NW
SILVER SPRINGS
CP RAILWAY
VALLEY RIDGE
GREENWOOD / GREENBRIAR
BOW RIVER
BRENTWOOD
VARSITY
TRANS CANADA HY
BOWNESS
CHARLESWOOD
COLLINGWOOD
32 AV NW
UNIVERSITY OF CALGARY
MONTGOMERY
UNIVERSITY HEIGHTS
16 AV NW

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 1999)

0 — 1 Mile
0 — 1.6 Km

- ■ UTILITY CAPACITY IN PLACE (BOTH WATER AND SEWER IN PLACE)
- ▨ SOME UTILITY CAPACITY IN PLACE (WATER OR SEWER, BUT NOT BOTH)
- ☐ NO UTILITY CAPACITY IN PLACE (NO WATER OR SEWER IN PLACE)
- ☐ AREA SUBJECT TO REVIEW
- — FUTURE SANITARY SEWER TRUNK
- — FUTURE STORM SEWER TRUNK
- — FUTURE WATER FEEDERMAINS
- ■ FUTURE RESERVOIR
- ● FUTURE PUMP STATION
- SECTOR BOUNDARY
- — FUTURE EXPRESSWAY
- — FUTURE MAJOR ROAD
- ■ TRANSPORTATION UTILITY CORRIDOR

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SHORT-TERM GROWTH MANAGEMENT STRATEGY

NORTHWEST SECTOR
MAP 7
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Appendix III

Development Industry Comments

URBAN DEVELOPMENT INSTITUTE CALGARY CHAPTER
SUITE 770, 999 - 8TH STREET S.W., CALGARY, ALBERTA T2R 1J5
PHONE: (403) 531-6250 FAX: (403) 531-6252 E-MAIL: info@udicalgary.com WEB SITE: www.udicalgary.com

November 24, 2000

BK

Barbara Koch
Section Head - City Wide Planning
Transportation & Planning Policy #8108
Land Use & Mobility
The City of Calgary
PO Box 1600 Station M
Calgary AB T2P 2M5

BY FAX TO 268-5623. Original to follow by mail.

**RE: DRAFT Short Term Growth Management Strategy
Residential Information Update 2000 – 2004**

Dear Barbara Koch:

Thank you for the opportunity to review the above-described document. We apologize for the delay in our response, especially knowing that it has already been delayed.

Since this document is very similar to last year's version, our position is the same as last year's. We do have some comments, which I outline below. But I would first like to emphasize Ron Nolan's comments from last year regarding our industry being more proactive with this material. Being more proactive and involved in it's development would help us better deal with the level of detail in this document. I would again like to invite the City people working on this forecasting tool to meet with our Planning Committee to work on this document.

Our more specific comments focus on the 10% market share forecast for the West Sector. Some of our members feel that it has already surpassed this and is continuing to escalate, probably to 15% or more. Our concern is that utilities will be built elsewhere not in keeping with market requirements. (There are 10% references on pp. 23, A-12, A-13, and A-23.) However, we will understand if this forecast is obsolete due to the document being delayed this year.

We are also wondering why some of the maps are dated April 1999 instead of being more recent. Lands that now have utility capacity in place are not shown. Our understanding is that the consultants are reviewing the specific recommendations regarding utility extensions.

Yours sincerely,

Mary Jo Va Order

Mary Jo Van Order, MES, MLIS, BSC
Executive Assistant

D:\UDI STUFF\Correspondence\LETTER STGMS 24NOV00.doc

CALGARY REGION HOME BUILDERS ASSOCIATION

November 23, 2000

The City of Calgary
Planning Policy Business Unit
4th Floor Municipal Building
800 Macleod Trail S.E.
Calgary, Alberta

Attention: Chairman, Growth Management Technical Committee

SUBJECT: Short-Term Growth Management Strategy
Residential Information Update 2000 - 2004

The Calgary Region Home Builders Association has reviewed the draft Short-Term Growth Management Strategy, Residential Information Update 2000 – 2004.

The CRHBA is pleased to offer its support of this document however, the Association is concerned that the future outlook for rental accommodation and affordable housing has not been addressed.

We believe that the City and Province must work in partnership with industry to provide creative solutions to the serious shortage of affordable housing opportunities within our city, especially in light of the ever increasing infrastructure costs to serve new growth areas.

We would like to thank the Growth Management Technical Committee for seeking our input on this document.

Sincerely,

Donna K Moore

DONNA K. MOORE
Executive Officer

DKM/sls

#100 3016 5th Avenue N.E., Calgary, Alberta T2A 6K4 Telephone (403) 235-1911 Fax (403) 248-1272
Email crhba@telusplanet.net